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ABSTRACT

This document contains 20 papers on lifelong education presented at a conference on aging. The papers, grouped into themes of trends and implications, resourceful roles (students and learners, teachers and mentors) and an agenda for the future, include the following: "Demographic Potential and the Quiet Revolution" (Opening Remarks by Robert A. Harootyan); "Education: Key to America's Future (Keynote Address by Robert Maxwell); "Lifelong Education: The Challenge of Change" (Executive Summary and Commentary by Nina S. Feldman); "Older Americans and Federal Vocational and Adult Education Opportunities" (Timothy Halnon); "An Overview of Lifelong Education (James C. Fisher); "Adult Learning and Life Transitions" (Carol B. Aslanian); "Community Colleges in an Aging Society" (Catherine Ventura-Merkel); "Lifespan Development and Lifelong Learning" (Eileen Feuerbach); "The OASIS (Older Adult Services and Information System) Program" (Donna Pedace); "College and University Programs for Older Adults" (Kenneth E. Young); "Project LEEP (Literacy Education for the Elderly Project)" (Bella Jacobs); "Computers for Seniors (Francisca Middleton); "Mentoring Motivates Learning throughout the Lifespan" (Carol H. Tice); "Training Machinists for the 21st Century" (Kenneth A. Kudek); "Alternative Certification for Older Teachers" (C. Emily Feistritzer); "Professors in Retirement: Are We Missing an Important Social Resource?" (Arnold J. Auerbach); "Self-Directed Learning for Older Adults" (Roger Hiemstra); "Becoming Part of Something Bigger than Ourselves" (Robert Morris); "Mentoring and the Roles of Older Citizens" (Michael G. Zey); and "Education for America's Future" (Murry Allen). A directory of 30 programs and resources is included, as are the tables of contents of the other 4 conference volumes. (KC)

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RESOURCEFUL AGING: *Today and Tomorrow*

Conference Proceedings

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Volume V

LIFELONG EDUCATION

AARP
American Association of
Retired Persons

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RESOURCEFUL AGING:
Today and Tomorrow

Conference Proceedings

Volume V
LIFELONG EDUCATION

October 9–10, 1990
Arlington, Virginia

AARP

New Roles in Society Program
American Association of
Retired Persons

Department of Rural Sociology
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The views expressed by the authors of the following conference papers are their own and do not necessarily represent formal policies of the American Association of Retired Persons. The papers are presented for information, debate, and discussion.

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Anita Stowell, Wendy Heil, Lori Marks, and Jane Takeuchi, of the New Roles in Society Program, planned and organized the conference and worked tirelessly to edit and publish the *Proceedings.* Wendy Cater, Annette Dixon, Mary Ann Hanson, and Sandra Williams, of the New Roles in Society Program, also made substantial contributions to this project. Ted Bobrow, Judy Burke, Barbara Coleman, Rich Gellman, Grant Harris, Karen Kim, Linda Mascall, and Sue Slaney, all of AARP, provided additional expertise in a variety of areas. Special editorial assistance by Jane Gold is also gratefully acknowledged.

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As rapporteurs, Cynthia Costello, Nina Feldman, David Gamse, and Richard Miller provided substantive expertise and insight to the conference and *Proceedings.* They attended all workshops in their specific issue areas, synthesized their content, and wrote the executive summaries. Their excellent work is to be commended.

Finally, a special thanks goes to the authors of the papers and the participants in the conference. Their knowledge, experience, and cooperation made the conference a lively event characterized by meaningful dialogue among a wonderful group of researchers, practitioners, policy makers, and exemplars of "Resourceful Aging: Today and Tomorrow."

OPENING REMARKS

DEMOGRAPHIC POTENTIAL AND THE QUIET REVOLUTION

Robert A. Harootyan
Director
New Roles in Society Program
American Association of Retired Persons
Washington, D.C.

Thirty million Americans today are age 65 and over, with the number projected to increase to 35 million older persons by the turn of the century. The official projection is likely to be an underestimate. Most Census Bureau projections in the past have been quite conservative estimates. It is feasible that by the turn of the century the number will approach 40 million.

During the last 30 years, the health of middle-aged and older Americans has improved substantially. In the 1990s, even greater advances are likely to occur. Major advances in biomedical technologies and drug interventions promise new ways to treat diseases, ameliorate their effects, delay their onset, and even prevent their occurrence. In the distant future, progress in genetic technologies is likely to generate even better treatment and prevention methods. Concomitantly, greater proportions of our population—at all ages—are adopting improved lifestyles and healthy behaviors.

The result is likely to be a population that not only lives longer but also lives healthier for a longer period of time. While diseases will still exist and take their toll on the oldest among us, their impact will be felt largely among the very old. These forces, when combined, are leading to what the New Roles in Society Program has called "the quiet revolution."

The Myopia of Negative Images of Aging

When most people talk about the growing elderly population, they become concerned about that growing number. There's no need to assume that those greater numbers are somehow a problem. This conference was not convened to explore the problems and burdens of an aging population. We have purposely avoided the orientations of most conferences on aging, where problems are described, burdens are emphasized, and the so-called demands of an aging society are discussed. Those are not the themes of this conference.

This myopia of thinking about the future older population can be crippling. We think there will be a healthier, more vital, increasingly active, more energetic, better educated, and more involved older population in the future than there is today.

We believe there is increasing recognition of the talents, experience, and vitality among older persons. Resourceful aging is a theme that will receive increasing attention in the 1990s and beyond. This conference is a special opportunity for all of us—and our colleagues in program management, policy development, advocacy, and research—to focus even more attention on this issue. It's an opportunity to seek out the philanthropic sector, the business community, voluntary and civic organizations, and the aging network to be more involved in creating opportunities for resourceful aging. We can promote greater awareness and understanding of older people as resources in our society. And the more attention we pay to this idea *today*, the better off everybody—all generations—will be in the years to come.

"We will highlight what works and how today's 'exceptions' can be tomorrow's 'rules'—a new vision of what life could be like in an aging society."

This conference seeks to foster not only a new image, but a new reality of what it means to be an older person and a participant in our society *throughout* one's lifetime.

I'd like to share a true story about one exemplar of vibrant aging. Henry Stenhouse, a gentleman from North Carolina, was campaigning for a seat in the U.S. Congress.

Lots of people run for public office. What was so special about this case? There were three things. First, he drank rum and Gatorade. Maybe the rum makes it taste better or makes it work better. The second fact may be related to the first one: Mr. Stenhouse was 100 years old! That alone should make some of us think more openly and creatively about resourceful aging. The third fact is the confidence that Henry showed in response to a very pointed question from someone about his qualifications for public office. Henry, without missing a beat, said that he was "as qualified as anybody else because I can talk all day and say nothing." Mr. Stenhouse lives and breathes resourceful aging both mentally and physically.

During this conference, we will focus on the positive and resourceful aspects of aging in our society. Exemplars such as Henry Stenhouse will be showcased. We will explore the implications of a longer living population and stimulate increased awareness of the productive resources of midlife and older persons. We will highlight what works and how today's "exceptions" can be tomorrow's "rules"—a new vision of what life could be like in an aging society.

The conference has been organized into four tracks: family and caregiving, work and second careers, lifelong education, and volunteerism. Within each track, we will examine trends and their implications; describe resourceful roles that midlife and older people play; examine what resources are available or are necessary for these role options to become more commonly available; and develop an agenda for future action. The action agenda will include projections of needed programs, policies, research, and attitudinal and societal changes.

We are especially fortunate to have three exciting speakers for the plenary sessions during the conference: Dr. James Birren, Director of the Borun Center for Gerontological Research at UCLA; the Honorable George Romney, National Chairman of VOLUNTEER - The National Center; and Robert Maxwell, President of AARP.

This conference is not an end. It is a beginning. It is a catalyst for generating the possibilities and opportunities for Resourceful Aging: Today and Tomorrow.

Robert A. Harootyan is Director of the New Roles in Society Program at the American Association of Retired Persons (AARP). His experience in the field of aging includes positions as Senior Analyst at the Office of Technology Assessment (U.S. Congress), Deputy Director of the Reverse Annuity Mortgage Program, San Francisco Development Fund, Associate Director for Research at the American Society on Aging, and Special Research Consultant in the Director's Office of the California Department of Aging. Prior to these positions, he served on the faculties of Cornell University, the University of Southern California (Andrus Gerontology Center), and the State University of New York at Oswego.

KEYNOTE PRESENTATION

EDUCATION: KEY TO AMERICA'S FUTURE

Robert Maxwell
President
American Association of Retired Persons
Maryville, Tennessee

The four tracks included in this conference—family, work, volunteerism, and lifelong education—are all vitally important and interrelated in many ways.

The idea of tracks conjures up special memories for me, because I've been in love with trains since I was a little boy. I was raised in a town of about 800 or 900 people in central Illinois. We had two railroads! One went north and south, and the other went east and west. Our town had two grain elevators and two railroad stations. That was really something for a town that size!

I can remember racing with my friends down to watch the express train whiz by. In those days, the train didn't stop for the mail. Instead, there was this funny-looking thing by the side of the tracks, and they hung the mailbag on it. The guy in the baggage car would reach out as the train passed and pull it in. What we were waiting for was the time he missed or dropped the bag, and the mail would go everywhere.

As you can tell, trains have a special place in my heart. It's a shame more people don't feel that way. People may complain about the railroads, but I have never spent three hours on a train circling the station!

I mention this because I think the four issues this conference addresses are connected, like boxcars in a row. Of course, each boxcar is distinct and carries its own load. But they are linked and depend upon the power of the train's engine to move them along.

The engine in our society is the educational system. Education is the linchpin for America's future. In my estimation, everything that is *wrong* with our society—poverty, crime, unemployment—can be traced to a lack of education.

Unfortunately, in a time when education and training have become essential, our educational system continues to falter, leaving many segments of the population without the basic tools to survive. People lack the basic reading, writing, and simple arithmetic tools. Unless America's education engine gets up a full head of steam—and soon—we're going to find our entire society stalled on the tracks.

As the new president of AARP, I believe that older people can help get that train moving again. As a group, we need to use our resourcefulness to help get America's educational system back on track. I also believe education is an appropriate application of AARP's new vision statement: "Bringing lifetimes of experience and leadership to serve all generations." With over 32 million members, AARP has some two billion years of life experiences that can be used to enhance the lives of people of all ages. I truly believe education is a key to unlocking that potential.

At AARP's convention in Orlando, I issued a challenge to our members and to all older folk in this country. To this group today I say:

SHARE YOUR WISDOM.
PREPARE THE WAY.

Older Americans possess the wisdom that blossoms from the experience of a lifetime, the education of a lifetime. Older people have something to contribute, and America needs it.

The problems in our educational system are broad in scope, and I know we can't do it all. But I'm confident we have the resources to make a difference, especially with three groups. We can help to prepare our youth, prepare our contemporaries, and prepare ourselves for the future.

Targeting Youth

Preparing our youth is the first theme I would like to address. It becomes more evident each year that today's youth are being shut-out from many of the opportunities *we* had, such as a good job or even owning a home. Of course, many factors contribute to these problems, but the common denominator in most cases is poor education and a lack of training.

Recent reports show that:

- Sixty percent of high school graduates are not prepared for entry-level jobs.
- U.S. businesses are spending billions of dollars each year to train and retrain workers, often in basic math and reading skills that should have been mastered in elementary school. The American Society for Training and Development estimates that within the next three years, 93 percent of the largest U.S. corporations will be training their workers in fundamental workplace skills.

"Older Americans possess the wisdom that blossoms from the experience of a lifetime, the education of a lifetime. Older people have something to contribute, and America needs it."

How can this be? America's teachers are better trained and classroom materials and technologies are more sophisticated and efficient than ever before. But the most talented and best-equipped teachers in the world cannot solve all the problems facing today's youth. Each day, classrooms are full of students struggling to cope with the effects of living in poverty; with handicaps and language barriers; with the temptation of drugs and alcohol; and with violence at school, in the streets, and even at home.

We expect our school system to work through these problems—usually with very limited resources—and meet the needs of our young. In many cases, schools are even expected to instill values, responsibility, and self-respect. The task set before our schools is simply monumental.

But I'm not here to make excuses for teachers or America's educational system. Certainly, there's room for improvement. The point is, they can't do it alone. They need our help.

My mom was an English and history teacher in our little town in central Illinois. She was an example to me of the philosophy and love of sharing knowledge with young children. She introduced me to Hercules and Perseus, to Mark Twain, O. Henry, and the Oz books. Reading helped to expand my imagination to worlds beyond my rural environment.

I want to convey that same message to all older Americans. We can make a significant difference in the lives of children by simply lending a hand. We can share our wisdom and prepare the way for America's youth. We can become more involved in education at all levels, from grade school on up. We can pass on to the younger generation not only our skills, but also our values. My generation grew up believing that you do a day's work for a day's pay. You don't find that true anymore, and it's hurting our competitive edge in the world.

Volunteer opportunities in the schools are as varied as the experiences of the volunteers themselves. Tutors, teachers' aides, after-school club advisors, and special project organizers are just a few of the roles awaiting us. We can read to youngsters; challenge gifted students to excel; befriend lonely children and confused teenagers; share professional skills and life experiences; and generate support for school budgets and programs. We can use our resources to help youngsters, and at the same time, enrich our own lives.

When our children or grandchildren succeed in life, we all benefit. By doing all we can to help the schools, we are investing in our *own* future. We're investing in America.

SHARE YOUR WISDOM.
PREPARE THE WAY.

Targeting Older Americans

The second target group older Americans can affect is people our own age, our contemporaries. We need to help them better prepare to meet the challenges of the future.

Adult illiteracy is a statistic that often goes unnoticed.

- Nearly half of all Americans over age 50 have limited reading ability.
- Almost a third of all adults cannot correctly complete a job application.
- Close to three million American adults have never set foot inside a school.

Adults who can't read have suffered frustration, embarrassment, and anger. But their future can be brighter. It's never too late to learn how to read.

If you can read, you can teach yourself to do anything. I taught myself how to lay out a plumbing system by reading Sears, Roebuck catalogues. We have the opportunity and responsibility to help our contemporaries who are illiterate—men and women who have been part of our story, but who are unable to *read* it.

Older volunteers offer experience, patience, and understanding when helping other adults. In many ways, it's much less intimidating to work with someone your own age than with a younger teacher or tutor. So older volunteers can be especially effective in fighting adult illiteracy.

> ***"To be truly effective in helping others, we have to first help ourselves. In order to share knowledge, we must always strive for it."***

As a group, we need to work to expand the opportunities for literacy training. As individuals, we need to find the time to volunteer. It is within our power to improve our contemporaries' basic literacy skills and enhance their quality of life. It's a soul-expanding experience when a person you're working with suddenly understands, when those lines and circles on the page finally make sense.

There is no other way to look at it: illiteracy is a thief. It steals away self-confidence and robs people of their potential. To understand why I feel so strongly about this, try to imagine the illiterate widow who has operated the same printing press for 25 years. This morning, however, she stands silent beside the machine. The familiar switches that she's relied on have been replaced by a computer screen—a screen she can't read. Yesterday, she could make that machine sing. Now she can't even turn it on. Illiteracy is a thief.

Illiterate adults are often the people we grew up with, the people we share our history with. These are the people that need our help. I say to you again:

SHARE YOUR WISDOM.
PREPARE THE WAY.

It's never too late to start.

Targeting Ourselves

The final target group I want to highlight will be the easiest to reach. I'm talking about preparing ourselves for the future. The experience of a lifetime—the wisdom I keep referring to—is not a static thing. We can and do learn throughout our lives.

To be truly effective in helping others, we have to first help ourselves. In order to share knowledge, we must always strive for it. For all older adults, learning and education are essential. Unfortunately, too many older people don't see education as relevant to their needs, and they buy into the myth of being too old to learn. That's sheer nonsense.

Education is a window, a window to self-awareness; to personal enrichment; and to building skills for survival, coping, and self-sufficiency. The endless possibilities for our future are waiting outside that window, if we only have the courage to open it.

As an association, AARP is committed to helping to open these educational windows by intensifying our efforts to eliminate existing barriers for older learners, barriers such as financial difficulties, transportation, and a lack of information about available programs. We must work to make the educational community more sensitive to the needs of older people. The older learner is typically more responsive to programs offered in churches, union halls, senior centers, retirement homes, libraries, and clubs than to traditional school-based programs. Education must be expanded in these settings.

As a nation, we must rid ourselves of the idea that the day a person turns 65, he or she becomes worn out and no longer useful, like an old shoe. The Depression taught my generation how to be resourceful. You don't have to throw old shoes away. You can resole them: the shoes retain their usefulness, and you avoid having to break-in a new pair.

Older workers are a valuable asset, but we need to continue to resole our job skills. We need to continue to learn, continue to grow. Demographics show that our nation should be pulling older people back into the workforce, not letting them go.

In the years ahead, there will be significantly fewer potential workers between the ages of 16 and 24, the traditional pool of workforce replacements. Many people in that age bracket will lack basic job skills, such as reading and math.

As qualified employees become more difficult to find, business and industry leaders are beginning to see older workers as the valuable asset they really are. Once again, America will need the older generation to remain competitive.

Conclusion

This country can't afford to let the education engine fall any further behind schedule. By striving for knowledge and continuing to learn, we can prepare the way for America's future. Education is America's best and only chance for tomorrow. It's a basic element that cannot be replaced. Without a better-educated America, the boxcars I spoke of—our family structure, workforce, volunteer spirit, and personal growth—will surely derail.

I intend to use the AARP presidency as a pulpit to call older Americans to action. We are a dynamic, resourceful group, and we need to get moving.

Older Americans can help give our children the gift of reading, which allows them to travel in time and to far away lands, to gaze at the outer limits of the universe and with the turn of a page, to discover the core of an atom.

We can help to give that widow in the print shop the tools she needs to survive. She's always done the job, and with the power of reading, she still can.

We can work to expand our own horizons by continuing to grow, learn, and conquer the mysteries of a changing world. Join me in opening that educational window of opportunity. Through education, we can right many wrongs. We can enrich many lives.

Older Americans are a natural resource that can help secure America's future. Join me in the quest for a better-educated America.

SHARE YOUR WISDOM.
PREPARE THE WAY.

Robert B. Maxwell is the President of AARP. Previously, he was chairman of the AARP Vice Presidents Advisory Committee and the Board Committee on Member Services. He was also a member of the Ad Hoc Advisory Committee on the Women's Initiative and a Trustee of the AARP Investment Program. Prior to his retirement in 1977, Mr. Maxwell was employed by the Hartford Insurance Group as an officer for Personnel and Education.

EXECUTIVE SUMMARY AND COMMENTARY

LIFELONG EDUCATION: THE CHALLENGE OF CHANGE

Nina S. Feldman
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Mohonk Mountain House
New Paltz, New York

As we move toward the next century, many of the present era's widespread assumptions about "the way things are" will most likely be challenged. Looming large among these assumptions are beliefs about the abilities, preferences, and roles of older Americans in a number of central areas. Education is no exception.

Assumptions about the capabilities and motivations of older persons as both learners and teachers are likely to be recognized as inaccurate. For example, the belief that older persons are less interested than younger ones in exploring new educational challenges, or less willing to push themselves in new directions, is being discredited. Vast numbers of older learners have eagerly embraced such concepts as Elderhostel and have attended seminars, workshops, and classes on any number of topics. Another erroneous belief is the idea that older persons have "old-fashioned" skills or irrelevant knowledge to share with others. This belief discredits the depth of work and life experiences that older individuals bring to their interactions with others, both formally and informally, as teachers and mentors.

Although beliefs such as these are grounded in stereotypes and misinformation, they are often difficult to dispel. Changing long-held ageist assumptions is a major challenge, and success in doing so is not likely to occur quickly. Yet, perhaps more than any other single force, the opportunities and outcomes created by lifelong education are certain to challenge such assumptions.

> ***"Changing long-held ageist assumptions is a major challenge, and success in doing so is not likely to occur quickly. Yet . . . the opportunities and outcomes created by lifelong education are certain to challenge such assumptions."***

Within the framework of lifelong education, learning and teaching are mutually reinforcing, and the processes of teaching and learning are interwoven. The dynamic process of lifelong education offers older—and younger—persons the ongoing advantages of exploring new opportunities, discovering hidden talents and skills, and gaining recognition in previously untapped arenas, most often accompanied by enjoyable social interaction. It becomes clear that lifelong education is a primary context for resourceful aging. It is a center-stage arena within which new roles for an aging population will confront old stereotypes.

The Concept of Education: Lockstep Versus Lifelong

The lockstep model of education assumes that life's paths unfold in a straight line. According to this linear image of aging and education, youths are educated, adults work, and older persons retire. In comparison, the lifelong education model provides a more fluid perspective in which individuals are considered to be learners—and often, simultaneously, teachers—who have a broad spectrum of needs and are exploring a wide range of opportunities throughout the lifespan.

The concept of lifelong education has been around for a long time. In the 1930s, professional journals were already suggesting that education could be viewed as a touchstone throughout life, a process that starts with the hour of birth, as the infant attempts to make sense of the newly discovered world, and continues until the very end of life. Unfortunately, policymakers have not always recognized the extent to which education is an integral part of life.

A medical analogy offered to the Southern Gerontological Society by Dr. James Birren in 1989 analyzes the difference between the two models of formal education by comparing them with childhood inoculations. The lockstep model is like the single injection that sustains the individual for a lifetime, whereas the lifelong model is like the series of booster shots—injections repeated over time—that are necessary to maintain the individual within a safety zone throughout life (Birren, 1989). With knowledge bases constantly and rapidly changing, the World Future Society predicts that by the year 2000 half of all service workers will have jobs that involve collecting, analyzing, storing, and retrieving information (Cetron, *et al.*, 1988). Thus, it becomes increasingly clear that the booster-shot model of lifelong education is best suited to address existing and future needs.

Lifelong Education: A Multidimensional Perspective

Broadly construed, lifelong education includes many different dimensions. "Process" learning—learning how to learn—is vital as older individuals encounter, explore, and master new roles. "Content" learning is also essential as new skills and knowledge are accumulated, stored, and used to address life's various challenges. Older learners and older teachers must explore what works best in their ongoing efforts to gain and share knowledge.

A close examination of the three other core areas discussed at this conference—work/second careers, volunteerism, and family/caregiving—reveals how the process and content of lifelong education together make up a cornerstone within each.

First, lifelong education is the basis for resourceful roles in worklife and lifework. It involves learning the new skills and technologies that enable older persons to take on new roles in the workplace. Training is critical as lifelong learners approach second, third, or perhaps even fourth careers. Ongoing education has also been found to provide increased economic security for older adults. A recent study by the William T. Grant Foundation Commission on Work, Family and Citizenship examines the income gap between older Americans with and without postsecondary education and reveals a marked difference in salaries. Persons age 65 and older who have a college degree far surpass their high school-graduate counterparts in salaries by nearly 200 percent (National University Continuing Education Association, 1990). Having learned new work-related skills, older learners also become empowered to teach others, thereby reinforcing intergenerational linkages in the workplace and beyond.

Second, lifelong education is a central component underlying resourceful roles in volunteerism. Much of this education is content learning as older persons explore new volunteer roles. At the same time, older volunteers learn how to share existing skills. Data from ACTION (1989), the federal domestic volunteer agency, reveal a marked increase in projects involving older persons as teachers and mentors. Projects in the Retired Senior Volunteer Program (RSVP), for example, have expanded from 11 in 1971 to 750 in 1989.

Third, lifelong education is necessary for resourceful roles in family and caregiving. Demographers are predicting improved health, vitality, and longevity for Americans in the years to come. Assuming that such predictions come true, an anticipated 40-41 million older persons in the year 2000 will be learning how to lead healthy lives and enjoy a dynamic, active, and involved last quarter of life. At the same time, however, roles will also change as aging—even resourceful aging—occurs, and many persons, especially older women, eventually take on the role of caregiver. With this new role, individuals will be required to learn a whole new core of information to enable them to care for someone who is frail or ill and dependent. Such learning is not likely to be a "one-shot deal." Ongoing advances in medical technologies that change the caregiver's knowledge base and options will require flexibility in learning about health care procedures. And along with caregiver information and skills, the care provider will also have to learn how to avoid burnout when confronting new stresses and demands. Thus, both content and process learning are essential in the family/caregiving arena.

Finally, lifelong education fosters self-esteem as older persons come to value skills they have always had and, therefore, may have taken for granted. Learning a new identity as a person with skills or knowledge to share is a tremendous leap of internal psychological growth. Dramatic changes in self-perception, which can occur as part of the lifelong educational process, may at times be overlooked. However, these personal insights reflect the deeply meaningful impact of lifelong education as an agent of change.

A Roadmap for the Future

Statistics from the U.S. Bureau of the Census (1984) describing the educational level of persons age 65 and over reveal an increasingly well-educated older population. Between 1985 and 2000, the median years of schooling for this age group is projected to increase from 11.3 to 12.4 years. Although an increase of 1.1 years may not appear tremendously dramatic, an increase of the median by even part of a year represents large numbers of older persons achieving higher levels of education. This change may be seen even more clearly in the fact that barely one-quarter of persons age 65 and older were high school graduates in 1965, compared with two-thirds of this population pro--jected for the year 2000.

Since people who have higher levels of education are more likely to pursue additional education in one form or another, this 40 percent increase by the year 2000 may be expected to have a ripple effect throughout the entire field of lifelong education. In both formal and informal settings, with or without a teacher, a better-educated older population is likely to be more interested in additional educational opportunities to enhance work goals, life skills, or personal enrichment.

Given the importance of lifelong education as a force in shaping the future, it becomes increasingly necessary to understand the themes and issues that affect this field. The challenge of this conference is to provide a set of markers for the present and a roadmap for the future with which we may come to understand and best use the resources inherent in an aging America. As Dr. James Birren so aptly noted in his keynote address to this conference many of us will eventually face the following series of questions: What are my responsibilities to myself and to others as an older person? As an older family member? As an older mentor? As a senior member of my community? As an aging denizen of the aging planet Earth? (Birren, 1991) The lifelong education involved in learning new roles and skills will be crucial in addressing these larger issues of challenge and change.

The Head and the Heart: Themes From This Conference

Although the four lifelong education sessions—Trends and Implications, Students/Learners, Teachers/Mentors, Agenda for the Future—were each quite different, careful review revealed similar themes across papers and sessions.

Heterogeneity: Varied Seekers, Varied Reasons

The vast variety of preferences, needs, goals, consumers, and providers involved in lifelong education was immediately apparent in presentations throughout the four sessions. Older learners are men and women of different socioeconomic classes, races, nationalities, and levels of educational attainment. While most lifelong learners are healthy and active, some are frail and perhaps housebound. And each is embarking on an educational journey for any number of reasons. These might include personal growth, retraining for the workplace, training for volunteer activities, assistance with a life crisis or transition (Aslanian, this volume), satisfaction of a long-buried sense of curiosity about something, or simply a desire to get out of the house and make new friends. Some older persons seek out lifelong education to enhance their basic survival skills while others use it for self-actualization and personal enrichment (Maslow, 1970). A recent survey conducted by the American Association of Retired Persons (AARP) and the League for Innovation in the Community College reveals that programming for older adults in two-year colleges often falls into categories of financial management skills, recreation, cultural enrichment, and contemporary civic issues (Ventura-Merkel, this volume).

> ***"Recognizing that the reasons for learning are as varied as the individuals who seek education allows us to view such heterogeneity with a tolerant eye . . . Clearly, the 'one-size-fits-all' approach does not meet the needs of older adults."***

Heterogeneity is also apparent in the learning styles and skills that each person brings to the new or ongoing educational effort. Some individuals are techno-literate and eager to pursue new technological skills, others may be techno-phobic, and still others may be attempting to deny the ways in which technological change is affecting their lives (Halnon, this volume). Similarly, some people perceive lifelong education as relevant to their lives, others are unaware of its relevance, and still others fear the educational experience altogether.

Recognizing that the reasons for learning are as varied as the individuals who seek education allows us to view such heterogeneity with a tolerant eye rather than trying to impose arbitrary motives, needs, and preferences. Clearly, the "one-size-fits-all" approach does not meet the educational needs of older adults (Fisher, this volume).

It is also noteworthy that heterogeneity is evident among providers of educational experiences. Public sector, private sector, nonprofit groups, and individual trainers are constantly developing offerings of educational significance. And as the intentions and capabilities of these providers are as varied as those of their consumers, lifelong education can be pursued at work, at home, or in the community with an ever-increasing variety of techniques and tools.

Knowing the Consumers: Meeting Their Needs

If we are to examine thoughtfully some of the implications of the heterogeneity of older learners and their search for lifelong education, we must strive to know these seekers in a deep and meaningful way. What are their reasons for pursuing lifelong education? Are they seeking a content-based set of skills to facilitate a job search or a new career? Are they exploring the process of learning a new role, such as teacher, mentor, or health activist, or are they reframing an old self-label?

The Older Adult Services and Information System (OASIS), a national, nonprofit membership organization that provides a range of educational services to older persons, recognizes the importance of understanding its market segment and the motivations of its members. Of necessity, many educational and social programs and services have assisted the frail elderly. However, OASIS provides an opportunity for a healthy, mobile older population to undertake new experiences largely in the realm of active lifestyles, arts, and humanities. Rejecting the notion that a provider should try to be all things to all people, OASIS focuses on providing a deeper, rather than wider, range of services. Currently, there are 25 OASIS facilities in 20 cities across the United States serving approximately 120,000 members (Pedace, this volume).

"Understanding the life and/or cognitive developmental stages of lifelong learners may provide useful clues for addressing these learners' needs."

Knowing the seekers also involves knowing their limits. Where and how far are these people willing to go to pursue lifelong education? Will they seek out a community college? Most people are within 20 minutes of a college that is there to serve their community's needs (Ventura-Merkel, this volume). Alternatively, older learners may choose to go to a neighborhood center. Some senior students may not be inclined to go out at all, preferring instead to turn on the television, listen to the radio, open a book, or access a computer network (Middleton, this volume). Thus, we must fully explore how lifelong education offerings might best be personalized within a classroom setting, and, at the same time, we must investigate older learners' preferences for self-directed learning over more formalized study and be aware of what such preferences entail (Hiemstra, this volume).

Yet another aspect of knowing the consumers is the developmental lifespan approach. In the past 20 years, there has been significant interest and research in psychological development across the lifespan. Erik Erikson was among the early theorists who presented a concept of personality development that incorporated adulthood. He defined his stages in terms of developmental tasks associated with a particular time of life, starting with the infant's need to develop trust. The seventh stage, "Generativity vs. Stagnation," occurs during adulthood. Generativity involves a concern for guiding and establishing the next generation. This stage is characterized by productivity and creativity; the individual derives a sense of fulfillment from nurturing and educating the next generation and from strengthening the institutions that support generativity. If these tasks are not undertaken, the result is a feeling of stagnation and of having accomplished nothing important (Feuerbach, this volume).

K. Warner Schaie, who has a long history of research in the area of developmental changes in adult intelligence, has advanced a theory encompassing five stages of adult cognitive development. Some aspects of Schaie's stages are similar to Erikson's stages of personality development. For example, because the young of the human species require so many years of rearing before they reach young adulthood and independence, Schaie recognized that adult cognitive skills are essential "to the survival, protection, and acculturation of the next generation," elements also found in Erikson's generativity stage (Feuerbach, this volume).

This research into age-related developmental differences reveals that older persons may have motives for pursuing lifelong education that are distinctly different from those of younger persons. For example, whereas younger persons are more likely to have a specific goal in mind (e.g., a higher degree, job enhancement), older persons are generally more likely to require that the experience in some way be "relevant" or "fulfilling" or meet some social need. Understanding the life and/or cognitive developmental stages of lifelong learners may provide useful clues for addressing these learners' needs. However, we must also acknowledge the importance of individual differences both across and within these proposed stages.

Addressing a Deeper Need: Personal Enrichment

Since the 1980s, college and university programs for older adults have become increasingly available and popular. One- or two-week intensives (e.g., Elderhostel) are becoming the norm rather than the exception. At many public universities, older persons interested in enrolling in regular college courses often can take them free or at discounted tuition rates. For older persons wanting to earn a degree or prepare for a second career, postsecondary institutions also have created a range of support services, including re-entry assistance, counseling, and financial aid (Young, this volume).

> ***"Offering both educational and emotional outreach, TL-Cs nuture a larger sense of generativity and community in the lives of the older volunteers and their young friends."***

Increasingly, colleges and universities are creating Institutes for Learning in Retirement, which offer a broad range of educational programs and courses to older persons who are educationally active and interested in pursuing topics, often at the college level. Requiring a high level of participant involvement, these courses may be taught either by a professor or by the class members themselves in a community of learners who are motivated by interest, enthusiasm, and the expectation of a rewarding experience rather than a grade. Many centers also provide opportunities for meaningful involvement in planning, evaluating, and, where appropriate, administering the program (Young, this volume). And through this array of college and university programs, older learners may gain the additional benefit of meeting a group of like-minded others and developing a sense of community.

Recognizing that many older persons feel a need to be a part of something bigger than themselves, the University of Massachusetts at Boston has created an academic program that enables older persons to become actively involved with major social institutions. Since its organization about 10 years ago, the Gerontology Program has offered a one-year course of study focusing on the Massachusetts health and welfare systems. Course topics include information on the aging and human services systems, research methods, executive and legislative policy processes, and oral and written communications. During the year of study, students prepare a report on a current policy issue. In numerous instances, these reports have influenced legislation and executive decisions (Morris, this volume).

Graduates of the program receive a certificate. Upon graduation, participants have found employment in the human services field, have sought out further training, and have worked on public policy issues in paid or volunteer capacities. For example, several graduates worked with a former faculty member to provide pre-retirement counseling and educational planning services for area employers. Because of the success of this program, the University of Massachusetts at Boston has become a catalyst for the development of a series of demonstration projects around the country (Morris, this volume).

Community colleges are uniquely positioned to provide a range of educational services at the grassroots level, and more and more of them are identifying and responding to the needs of older adults. Nearly 25 percent of community colleges are currently offering programs that have been specifically designed for older learners. These programs generally fall into three categories:

- financial management skills (retirement financial planning; wills, probates, and trusts; and savings and investments);
- health and cultural enrichment (arts and crafts, exercise, nutrition, trips, and humanities and social sciences); and
- contemporary civic concerns (technological literacy, political issues, etc.) (Ventura-Merkel, this volume).

In addition, two recent surveys have revealed high levels of interest both in programs that serve older adults and in those that train students and paraprofessionals to deal with aging. To date, a small number of community colleges have taken the lead in responding to this interest by developing programs that enhance the ability of older persons to contribute to the community and to continue in paid employment. Among these programs are:

- job training and career preparation to assist older adults in meeting the skill requirements of a changing workplace;
- practical life skills to assist older adults in coping with changing social, economic, and technological demands;
- educational opportunities for personal enrichment; and

- training for caregivers of older adults to ensure that there are skilled professionals in the medical and social service fields (Ventura-Merkel, this volume).

> ***"Previous negative educational experiences, a negative self-image, inaccessibility of the programs . . . can prevent would-be learners from actively persuing education and training."***

Although the market for these programs will grow dramatically over the next 5-10 years, most community colleges unfortunately do not yet offer them, primarily because of limited financial resources. In addition, there is a lack of awareness both of the impact of an aging society and of the role community colleges can play in assisting their communities and the nation in meeting the challenges posed by changing demographics. Together, these shortcomings have severely limited the development of educational programs that meet the needs of older learners (Ventura-Merkel, this volume).

Community Service

School-based mentoring programs involve older persons in shaping the future lives and livelihood of youth. Through these programs, older persons are actively able to share their own life-learned skills and, at the same time, find a sense of value, belonging, and pride in volunteering to work for the social good. The Teaching-Learning Communities (T-LCs) program is a prominent example of a socially responsive mentoring program. Although originally begun with elementary school children, one offshoot—the T-LC Mentors program—now pairs older volunteers with adolescents who are at risk of dropping out of school. The program was established to help these teenagers develop a sense of self-esteem, stay in school, and remain free of drug or alcohol abuse. Their mentors gain a sense of ongoing involvement and self-efficacy in their efforts to be part of the solution to a serious social problem. Offering both educational and emotional outreach, T-LCs nurture a larger sense of generativity and community in the lives of the older volunteers and their young friends (Tice, this volume).

Focus: HOPE, a Detroit-based civil and human rights organization, has tapped the resources of retirees in its Machinist Training Institute. The average age of metal workers in the United States is 58, and they are retiring at a rate 10 times faster than the educational system can replace them. The Institute was created to recruit and train novice machinists, most of whom are recent high school graduates. Skills that might be in danger of "dying out" as an older generation of workers leaves the field are taught to these novice machinists by teachers who have lived their lives involved in the trade. For many of the faculty, between 60 and 75 percent of whom are retirees, participation in this apprentice program provides a sense of accomplishment as their teaching enhances the lives and livelihoods of others (Kudek, this volume).

Emeritus Colleges offer retired university professors the opportunity to share their experiences and insights with younger colleagues and to participate in community service programs. As an official center within the university, each college enables retirees to continue their service to the institution and to the community; assist the working faculty in auxiliary activities such as tutoring, lecturing, organizing colloquia, or developing special projects; and aid the administration in fundraising, alumni activities, outreach services, and community relations. For example, through Southern Illinois University's Emeritus College, established eight years ago, emeriti have been involved with blood banks, public library programs, and small business support services. They have also recruited and tutored students, taught pre-retirement planning seminars, and conducted research and feasibility studies. As a result, their contributions have expanded and enriched the university's capabilities (Auerbach, this volume).

Barriers to Participation in Lifelong Education

Both internal and external factors constitute barriers to participation in lifelong education. Previous negative educational experiences, a negative self-image, inaccessibility of the programs, and a lack of information about educational opportunities can prevent would-be learners from actively pursuing education and training.

Internal Barriers. Acknowledging the person's inner psychological reality provides a critical dimension in understanding the dynamics of lifelong education. Negative self-labels can reduce older adults' motivation to pursue educational opportunities, as can the sense of anomia, or powerlessness (Fisher, this volume). An older person who views him or herself as a learner or nonlearner and who has used such a self-label for many years is likely to continue using it over the course of a lifetime. But underneath the barrier of a negative self-label, the self-proclaimed nonlearner is apt to be quite capable of learning new skills. Inexperience or unpleasant prior experiences with education may also be major stumbling blocks.

Illiteracy may lead older persons to believe that all further educational experiences are foreclosed. Concomitantly, denial of the problem or unwillingness to expose oneself as an older nonreader can surround existing barriers with layers of complexity (Jacobs, this volume). Nonetheless, even those who are unwilling to seek out lifelong education may be receptive to outreach.

The experience of the Literacy Education for the Elderly Project (Project LEEP) has demonstrated that older persons who could not read were often hesitant to enter an acknowledged literacy program, finding it more acceptable to come into an ostensibly content-oriented program in which reading was taught. Ultimately, the best means of recruiting these people proved to be by making contact with them through community organizations with which they were already familiar and comfortable (Jacobs, this volume). Outreach to older learners regarding literacy or any other lifelong educational experience must be extremely sensitive to the subtle barriers established by inner psychological realities, outdated self-labels, and erroneous expectations about the educational offering.

The challenge for educators is to understand how the individual's drive toward continuity with the past and the constraints of that person's inner psychological reality work to restrict his or her options in the present. Recognizing that an individual's past is the foundation upon which the future is laid allows for a deeper understanding of how new learning will most readily occur. Has the older learner previously preferred visual or auditory instruction? Concrete or abstract discussions? What combination of work, play, and education best suited the individual's learning style in prior years? Cues such as these will help teachers individualize programs of lifelong education for older learners.

External Barriers. External issues, such as inconvenient timing, hard-to-reach locations, or inadequate outreach to older target populations also limit access to lifelong education. By becoming aware of older learners' preferences and rights, providers address these barriers and work to ensure that lifelong education remains a *dynamic process* of exploration and interaction that continues to be shaped by the individual's needs (Hiemstra, this volume).

For example, SeniorNet, a nonprofit educational organization that offers computer training and networking capabilities to seniors, is an excellent example of a "dynamic" provider. The 4,000 members of SeniorNet receive instruction on the use of computer technology, which they use to share their knowledge with others. SeniorNet's unique feature is its electronic computer network through which members can communicate with one another, both seeking and giving information. A geographically diverse community is being created through the computer network (Middleton, this volume).

The issue of access also relates to training teachers and mentors for formal and/or informal participation in peer and/or intergenerational educational situations. Age discrimination limits access to teaching jobs. Even though alternative teacher certification programs have been organized to help college-educated older people pursue careers in teaching, data on new hires indicate that a small percentage of older job candidates actually find employment in schools. And because the 1990s myth about impending teacher shortages has not materialized, the National Center for Education Information projects that, barring a substantial teacher shortage in the future, older persons seeking second careers in teaching may continue to experience barriers (Feistritzer, this volume).

At the same time, however, many midlife and older teachers are shunning early retirement and continuing to work past age 55. The challenge here will be to provide these older teachers with up-to-date skills that will enable them to blend new technology and teaching approaches into their lifetimes of knowledge and experience.

While consumers would obviously benefit from a dynamic approach to lifelong education, providers face internal and external barriers that may block the development of educational offerings. For example, providers can become mired in the inertia of historical precedent (i.e., "we've always done it this way") and find it difficult to consider new approaches.

Many corporations appear to be reluctant to establish formal mentoring programs despite the likelihood of heightened collegiality across generations of employees, a strengthened sense of community, and the increasingly widespread exchange of ideas. The difficulty of documenting the direct impact of mentoring on the "bottom line" renders this concept suspect to many executives (Zey, this volume). Moreover, the state of the nation's economy, with current concerns over productivity and profitability and apparently more pressing social service priorities, weakens the commitment of public as well as private funds to promote and facilitate lifelong education.

Thus, individuals or organizations "outside the mainstream" may be best suited to serve as agents of change for lifelong education. Acting as "agent provocateurs," challenging the status quo, and breaking the lockstep of precedence require the courage to recognize that, although the whole is greater than the sum of its parts, some of the parts may, indeed, need changing. Unfortunately, such reliance on outsiders for impetus is not always possible.

The Future is Now: Transition, Transformation, and the Older Learner

America is being transformed from an industrial to a communications society. In this new order, technology is shifting from the production line to computers, information rather than goods is becoming the primary output, and knowledge is beginning to overshadow capital as the dominant strategic resource.

With this transformation, lifelong education is becoming increasingly vital in helping Americans adapt to these changes. Nowhere is this more apparent than in the workforce. The American educational system is failing to graduate employable workers who meet the needs of the workplace of today, much less the workplace of the year 2000. As a result, the American workforce is rapidly losing its world-class status (Allen, this volume).

To combat the situation and help America regain its status in the world economy, corporations and community and nonprofit organizations must support and encourage lifelong education. At the same time, young, midlife, and older adults will have to become more responsible for their own education. An "educative community," in which all members are responsible for the educational process is becoming a real possibility. In such an instance, the commitment of time and energy to educating one another would naturally build intergenerational linkages and strengthen any existing sense of community (Hiemstra, this volume).

One of the major challenges to providing lifelong education in the coming years will be helping older persons get past the mistaken beliefs that "education won't make a difference in my life" or that "there's nothing I can do to learn what I need to know." More and more, the vital mission of lifelong education, as it seeks to address the challenge of change, will be empowering the individual on all levels.

Ideally, the individual will be empowered internally with self-labels that promote feelings of competence and social skills; with a knowledge base that facilitates effective action in worklife, health promotion, caregiving, volunteerism, and so on; and with an understanding of how to learn that will encourage such activities throughout the lifespan. Lifelong education is also a tool for empowerment in external situations—serving the individual as a social being and as a citizen of the community and the world.

> ***"Lifelong education . . . will become increasingly important in providing the energy our society needs to transform 'remorseful aging' into 'resourceful aging.' "***

However, before lifelong education can promote an individual's personal, social, or communal empowerment—indeed, before an individual can pursue any form of lifelong education, whether as a learner or as a teacher/mentor—that individual must first *recognize a need* for education. Opportunities to fill this need must then be *perceived as relevant*, and the prospective learner/teacher must understand how to pursue the opportunity, must be able to pursue it, must be motivated to pursue it, and finally must *commit effort and energy* to the pursuit. Although these criteria may involve decisions that are not consciously made, each decision will become a juncture at which the pursuit of lifelong education could go awry.

To enhance the likelihood that older adults will initiate and pursue such a decision-making process, providers must review their own efforts to understand their market and its heterogeneity. Computerized networking is transforming corporations, and it can also be useful in reshaping the ways providers of lifelong education communicate and coordinate among themselves to meet older persons' needs. Organizing, linking, and coordinating resources to expand cooperation and collaboration may be the single most important step providers can take toward enhancing the use of lifelong education as a cornerstone of resourceful aging.

Conclusion

"What is the point of lifelong education?" This query may be answered in numerous ways. The most plausible answer is another question, one that is posed to explore the depth of the *process* rather than the *content* of lifelong education. Asking "What are we doing with what we learn in later years?" rather than "*What* or *how much* are we learning?" confronts head-on the issue of empowerment as a core objective of lifelong education (Feuerbach, this volume). It also raises the thorny question of evaluation for the lifelong education community: "How shall we review our efforts and assess their efficacy?"

Similarly, the question, "How might lifelong education best be used to address social issues and problems?" also explores the issue of evaluation and desired outcome. Community building is emerging as a highly valued dimension, as people of all ages are seeking to address something larger than themselves, to do something that will have some meaning for the greater social good. In this respect, a new definition of retirement is also required to make social needs paramount (Morris, this volume).

One last response to the query "Why lifelong education?" rests on evaluating the personal outcomes of such activities. How much enjoyment has the experience provided? Has it offered a sense of fulfillment and recognition to persons who may be seeking new identities in retirement? For many older persons, the value of lifelong education increases as it is accompanied by social interaction, social action, and social recognition.

In coming years, the paradigm of retirement that encourages older persons to pursue the "luxury" of withdrawing into self-enrichment during the later years will be critically reviewed. Society may eventually come to view older persons as a strategic resource. The context for the new awareness will be lifelong education, which will become increasingly important in providing the energy our society needs to transform "remorseful aging"—aging with regrets over a life lived less than fully—into "resourceful aging"—growing into the recognition that human potential in the later years can be an unending process of exploration, empowerment, enjoyment, and expansion. As such, lifelong education is vital because it supports the very essence of the individual's search for enjoyment, meaning, and accomplishment in life.

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OVERVIEW: TRENDS AND IMPLICATIONS

OLDER AMERICANS AND FEDERAL VOCATIONAL AND ADULT EDUCATION OPPORTUNITIES

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I'm delighted to be able to spend a few minutes with you this morning talking about one of my chief interests, lifelong education. I am rapidly approaching 50 myself, and I've been involved in education for all but four years of my life. I haven't always been in school full-time, but I've been in school part-time for a number of years. And I think I've learned much more from the older adults who have been in classes with me than I've given to them.

The nation and our population are facing unprecedented challenges and opportunities. I'd like to take a few minutes this morning to discuss several things: changes in our workforce and education requirements in the next decade; the needs of our middle-aged and older workers; and finally, the resources that older Americans bring to this area.

Older Americans Involved in Lifelong Education

Resourceful aging is certainly an appropriate focus here. Since 1970, the number of adults aged 65 and older has increased by nearly 13 million. In 1987, nearly 30 million Americans were 65 or older. And the number of older Americans continues to grow exponentially.

The educational attainment of persons aged 50 and over is rising rapidly as well. This is a function of several factors. First, the well-educated Baby Boom generation is about to join the over-50 age group. Even more significant is the fact that there is now increased leave time from work, and mid-life and older Americans are enrolling in and continuing their educational activities to an unprecedented degree. Part-time students are the fastest growing population in higher education. Nearly one-half of all college students are part-time. The number of students aged 50 and over is growing at a rate twice that of the population as a whole. Older Americans are returning to school.

Most part-time students are entering programs at two-year community colleges. These institutions, in my opinion, represent the cutting edge of continuing education. This is where the most profound changes are taking place. But institutions must recognize the important differences in educational programs for high school students going to a community college for the first time and for older workers faced with a return to a community college for retraining. There are differences in identifying and recruiting students, and in dealing with students and their families, especially if they are unemployed or in retraining situations. We are just beginning to address the many needs of a diverse student population.

> ***"The increasing educational attainment of persons aged 50 and over is a fact. And, older persons are an incredible resource that our nation can use."***

A number of university and community college programs are of interest to retirement-age people. Some institutions have developed centers for learning in retirement. Others sponsor Elderhostel programs. Twenty states have enacted tuition waiver legislation for older Americans which enables older students to enroll tuition-free in courses at state colleges and universities. This is a significant step toward providing lifelong education opportunities for all Americans.

In addition, middle-aged and older Americans have access to the greatest amount of information technology ever available to students involved in lifelong education. This new technology now includes computers, VCRs, cassette players, and stereos, to name just a few.

Many older Americans are responding to the educational challenge by serving not only as students but as add-on faculty at community colleges. Others are returning to teaching in secondary schools, and others are serving in mentoring programs. The list goes on and on, demonstrating the ways older Americans are becoming America's resources in many areas. Many universities are now awarding credit for prior experience, and older students are taking advantage of this welcome policy change in record numbers every year.

Training Challenges in a Changing Workplace

I would like to comment briefly on the downside of technological change and how it affects older Americans. I'm talking about retraining. Retraining is one of the primary challenges facing our country in this decade. Literally tens of millions of middle-aged, and particularly older, Americans are going to require retraining in order to retain their current jobs or qualify for new employment. We've seen profound changes in the need for workers—from manufacturing and agriculture to service and information.

Educational requirements for new jobs in the next decade are increasing rapidly, but they're not necessarily reaching the bachelor's degree level, as most of us assume. They're clustered at the associate's degree level, the two-year degree level.

A few years ago, I managed a retraining program for unemployed skilled workers and coal miners in Johnstown, Pennsylvania. I had a lot of good friends in their 50s and early 60s who were suddenly faced with the prospect of unemployment. What an enormous challenge! People who had worked for the same employer for 20, 30, even 40 years were faced with unemployment. This pattern is going to be repeated again and again. I don't want to belabor the point, but I think what has happened in Johnstown—in the rust belt—is now happening in the sun belt and throughout the country. The need for retraining is paramount in the coming decade.

However, the folks in Johnstown have been able to marshall the resources of older Americans to serve as mentors, counselors, peer educators, and advisors, and it has been an enormous success. Older adults serve as paid workers when they're working in an educational capacity, but when they're serving in a counseling or peer advising capacity, they are usually volunteers. I'd like to see efforts like this repeated throughout the country.

The literacy and functional literacy needs of adult Americans are great. The Department of Education is doing several things to improve the workplace literacy and functional literacy of older Americans. We fund a number of workplace literacy programs across the country. These programs are designed to work with education, business, and labor to improve the skills of middle-aged and older workers so that they can deal with technological change and the literacy requirements it imposes. The Department of Education is working in coordination with other agencies, such as the Departments of Labor and Health and Human Services, to propose strategies for addressing the issue of workforce preparedness for Americans of all ages.

Opportunities for the Future

I'd like to leave you with several thoughts. The increasing educational attainment of persons aged 50 and over is a fact. And, older persons are an incredible resource that our nation can use. The rapid evolution of technology is also a fact. There's a great need for continuing instruction to address evolving technoliteracy demands. There's a lot of interest in career transitions, second careers, and entrepreneurial opportunities among mid-life and older adults. One of the real needs these workers have is for retraining. Peer instructors, mentoring, and working with intergenerational programs are all important parts of this process.

We at the Department of Education welcome the work of community organizations and of AARP in helping us find the answers to these questions. Funding *is* available for these purposes, and information about Department of Education programs is listed in the handout called *A Resource Guide for Discretionary Funding for Adult and Vocational Programs*. The other resource I want to recommend is *A Directory of National Clearinghouses on Adult Education and Adult Learners.*

Finally, I'd like to share an observation with you. I've lived and worked in American Samoa, I've worked on Indian reservations throughout this country, and I've worked in bilingual vocational programs serving Asian-Americans. In every instance, I've been profoundly impressed with the people's respect for the wisdom of their elders. Recently, I've noticed that this nation is starting to move away from its infatuation with youth and to recognize the resources and knowledge that parents, grandparents, aunts, and uncles can share with all generations. I only hope that this trend continues, and I do believe that it will.

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AN OVERVIEW OF LIFELONG EDUCATION

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Lifelong Education and New Roles

In 1970, Sam Keen wrote, "Most persons possess a wealth of dreams and fantasies which have never been cherished or taken seriously and hence have not been integrated into the total self-image. The chief function of the teacher is to give students permission to allow exiled portions of their own personalities to return home and be welcomed" (68). Decades earlier in the '20s, Eduard Lindeman (1961) said that the purpose of adult education was to help us understand our experience.

These descriptions of the function of education highlight its role in helping a person build on the past and integrate and focus new growth for the future. It is from that perspective—integrating experience and pursuing dreams—that I discuss lifelong education as a means of achieving resourceful aging. New roles in society begin as lifelong education helps people to make career and life choices.

A simple, but profound, question has followed each of us since adolescence: What I am going to do with my life? The prominent Roman statesman Marcus Cato was once asked why he started to study Greek at the age of 80. "Wasn't he too old?" his friends wondered. "But 80 is the earliest age I have left," Cato answered.

Careers are what we do with our life at every age. They are our vocation, our calling, our life's work. They are not necessarily what we get paid to do. We make choices about them throughout life. A retired professor, Burton Kreitlow (1989), has studied the choices people make about retirement and has categorized them as regressive, neutral, growing, and soaring. The regressive person is disengaged, withdrawn. The neutral person is a participant in activities, although as a user rather than a giver; the neutral person may attend classes, but is unlikely to contribute much to the program. The growing person is the new producer, the contributor, the pursuer of a cause, the improver of the world. And the soaring person has grown to self-actualization and is off dealing with the future.

Programs in lifelong education can help people develop from regressive to neutral and from neutral to growing. It is much more important that we who are in lifelong education see our function as facilitating this kind of growth than it is for us to develop lists of new roles into which people should be slotted. One cannot underestimate the importance of helping people to enlarge horizons, to influence rather than be influenced by the environment, to contribute to the well-being of others and thereby reaffirm their own lives. New roles will be the product of moving from apathy to interest, from stagnation to productivity, and from the past to the future. The lifelong education that helps people choose and perform their life's work will be the most important of all. That is certainly the experience out of which new roles will be born.

Barriers to Participation in Lifelong Education

If lifelong education empowers people to change and grow, then why are many older adults not engaged in lifelong education activities? Unfortunately, a number of things get in the way. Lifelong education providers must recognize and address the many barriers to participation as they develop lifelong education opportunities for adults of all ages.

The most pervasive barrier to participation in lifelong education is the lack of educational experience by many older adults and the belief that lifelong learning is not vitally linked to the mainstream of life. The undereducated and those whose educational experiences were unpleasant often are blinded to learning opportunities by their prior experiences, or lack thereof. According to the U.S. Bureau of Census in 1984, about 30 percent of the population over age 55 had not completed 8th grade.

This theme plays out in several ways. For example, learning is not widely understood as necessary for survival among older adults, to say nothing of successful aging. A list of services available to older adults usually is filled with social and health-related services, but there rarely is anything on the list even remotely related to education. My point is that many older adults, and many professionals who work with them, do not see education as the answer to real-life problems or as making any contribution to the well-being of older adults. Not enough has changed since the late Howard McClusky commented that "in general older persons do not perceive education as having any relevance for their interests and needs" (1972, 3-4). Perhaps we should stop talking about learning needs as if they were something apart from real life, and simply talk about needs, period.

Pushing the matter of educational inexperience a step further, the lack of basic skills necessary to participate in lifelong education is also a barrier. For illiterate or marginally literate older adults, participation means coming out of the closet and giving up a lifetime of effective coping and coverup to begin to learn basic skills. Half of the target adult basic education population is age 60 and over (Pugsley, 1987). Furthermore, 2.3 million adults are added to that number each year. Therefore, in future years significant numbers of older adults will lack adequate preparation for a society which demands ever-increasing levels of skill in reading, writing, and computing. Although we know some things about literacy among adults in general, very little information is available to describe the impact of illiteracy on older adults in particular.

A third barrier is a sense of anomia on the part of many older adults. Anomia is a person's perception of his or her own alienation or powerlessness, or the normlessness or unreliability of the environment. My research findings call for an understanding of nonparticipation in education-related activities as a possible expression of alienation, powerlessness, or the inability to act positively in one's role as an older adult (Fisher, 1988).

Participation in any activity, including lifelong education, assumes some level of control over one's life—the power to initiate social involvement, the ability to choose activities on the basis of interest and need, and confidence in self and the environment. But when alienation has distanced a person from his or her surroundings, and an environment is perceived as undependable, some older adults may be powerless to participate.

Developers of programs in lifelong education may, therefore, need to look beyond the questions of need to questions of delivery and access, not only from a physical standpoint but from a psychological point of view as well. In order to overcome this barrier, lifelong education programs must be delivered in such a way that they effectively bridge the gap of powerlessness and alienation experienced by many older adults.

Developing Educational Programs for Adult Learners

Looking beyond barriers to successful program development, several factors must be taken into consideration if lifelong education is to be the path toward resourceful aging. The first factor is continuity.

It may not always be clear to those of us who are approaching older adulthood how "the last of life is really that for which the first was made," as Browning wrote. But what should be clear is that older adulthood does not begin in a vacuum and is in no way disconnected from what has gone before. What is usually new in older adulthood is the time and resources to pursue the interests and unfinished business of earlier years. The list of items that "I have always wanted to do" is endless. My own father, after sending his kids to college, went to college himself upon retirement. A friend just got the Harley-Davidson motorcycle he had always wanted for his 55th birthday. And the list goes on, describing individuals pursuing lifelong agendas over time and through changing circumstances.

Continuity is an important factor for two reasons. First, if you want to know where people are going, look at where they've been. If you want to know how to help them or engage them, look at where they're coming from. Socioeconomic status, lifestyle, and interests remain amazingly constant. Probe the experience on which new learning builds. The past is always prologue.

But more importantly, if we are serious about new roles for older adults, we need to consider issues related to lifestyles, priorities, and the ways people combine work, education, and leisure during the years of early and middle adulthood. Preparation for new roles begins with those earlier experiences; new roles are not limited to older adulthood. Let me illustrate: the frequency of job change throughout early and middle adulthood is transforming the meaning of retirement. Retirement has become less a time for complete withdrawal from employment and more a time for redirecting one's vocational focus. Many of the seeds for new roles in older adulthood are planted years before. Preparation for new roles is a lifetime pursuit addressed by lifelong education.

A second factor in effective lifelong education is heterogeneity. Seeing education as a way of addressing the real needs of real people confronts us with the heterogeneity of the older adult population. This group is so varied that it is impossible to discuss the needs of older adults as if they were a single, homogeneous population.

> ***"Many of the seeds for new roles in older adulthood are planted years before. Preparation for new roles is a lifetime pursuit addressed by lifelong education."***

Life is not constant for older adults. One size does not fit all. My research suggests that there are five age-independent periods in older adulthood, three periods of relative stability separated by two transitions (Fisher, 1990). Older adulthood begins with a period of continuity with middle age when employment is replaced by other activities. That period is followed by an early transition into older adulthood, brought on by illness, the death of a spouse, or a relocation. The third period encompasses a revised lifestyle in which one adapts to the changes brought about in the early transition by setting revised goals and pursuing new activities. This revised lifestyle period concludes in a transition caused by the loss of personal health, mobility, and independence. In the final period, a person adjusts to an increased level of care by others and loss of autonomy, and experiences a renewed sense of finitude.

When we look at what occurs in each of these five periods, we find a number of variations on themes. Maintaining health, securing housing, adapting to changes, revising goals and activities to conform to circumstances, making friends, and engaging in worthwhile activities need to occur at each step of the way. Although these needs are common to this whole pattern, each is clearly framed by the developmental period in which it occurs. Thus, a range of real-life needs appears in different forms in different periods. For example, developing skills in forming positive interpersonal relationships means one thing at the age of 65 when one has just retired and is happily married; it means quite another when one is 82 and one's spouse and friends have died.

When we identify new roles for older adults, we are tempted to look at the tremendous resources that are available in the first period among the newly retired. But the potential for new roles exists in each of these periods. An important function of lifelong education is to help individuals create new dreams, develop new lifestyles, and engage in their life's work in each period along the way.

I think there is one word that captures the essence of developing new roles through lifelong education. That word is "redemption." To participate in the growth of older adults is to participate in the drama of personal and social redemption. The notion of redemption suggests deliverance and renewal. By its very nature, lifelong education is recreative and restorative, helping people to grow into new roles as they perform their life's work.

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ADULT LEARNING AND LIFE TRANSITIONS

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The Office of Adult Learning Services

Since its inception in 1980, the Office of Adult Learning Services of the College Board has focused on two areas of need: the needs of colleges and universities that seek to enroll and serve adult students, and the needs of individual adults who seek information to help them make informed decisions about beginning or continuing their schooling. The Office of Adult Learning Services (OALS) defines adult students as persons age 25 or older who have been away from formal schooling for more than just a year or two. In the course of its work, OALS has collected vast amounts of information about higher education and the needs of older persons.

Trends in College Enrollment

The 1980s were widely predicted to be a time of declining college enrollments. Given a steady decrease in the number of high school seniors graduating each year, the future looked gloomy for higher education. But, defying all predictions, college enrollments rose throughout the 1980s.

College enrollments rose almost 50 percent in the 1970s, from about 8 million in the early '70s to about 12 million at the end of the decade. Then, in the 1980s, even though high schools were graduating 25 percent fewer seniors, college enrollments surprised everyone and continued to climb from 12 million in 1980 to 13.4 million students in 1989 (U.S. Department of Education, 1990). What was happening nationwide was that the market was not shrinking, despite the steady decline in the number of high school seniors graduating each year. Rather, the market was expanding. This can be attributed to adults going back to college in larger numbers than ever before. The proportion of adult students among college enrollments has been rising steadily over the past two decades, from roughly 30 percent in 1970 to 40 percent in 1980 to 45 percent in 1987 (U.S. Department of Education, 1989). That means that for every college student *under* 25, there is one *over* 25.

The College Board's study of adult students in American colleges revealed that each year one out of 25 American adults enrolls in a college course or program. This produces more than 6 million adult students annually (Aslanian and Brickell, 1988). But these figures reflect only those adults seeking academic credit. If those who return to college for noncredit, continuing education programs are included, the number is at least 12 million. The notion that college students are a group of 18- to 24-year-olds from middle-class families is almost as inaccurate as the notion that the average American family is made up of Dad (wage earner), Mom (homemaker), and 2.3 kids.

> ***"Adults of all ages cite life transitions as the major forces behind their learning. Learning becomes a way of coping with life changes."***

Profiles of Adult Students in Higher Education Today

In the College Board's recent study, *How Americans in Transition Study for College Credit* (Aslanian and Brickell, 1988), the Office of Adult Learning Services collected profiles of adults who had returned to college study for credit in the past year. The data revealed several interesting patterns:

- More women than men study as adults. We concluded that women are doing later in their lives what some men were able to do earlier, reflecting a true difference in their life schedules.
- From a race and ethnicity perspective, there is much yet to be done. Our study indicated that whites dominate the adult learning market, constituting 90 percent of all enrollments.
- An overwhelming majority of adult students work (85 percent), and most work full-time. Most adult students are very busy people, juggling work, family, and studies.

Life Transitions as Reasons to Learn

Adults of all ages cite life transitions as the major forces behind their learning. Learning becomes a way of coping with life changes. Shifts from one life role or status to another are usually marked by specific events that signal the need for additional learning to deal with the transition.

From age 25 through age 65, life changes explain about 85 percent of all learning, with only minor differences from one end of the age range to the other. After age 65, life transitions explain about 65 percent of all learning (Aslanian and Brickell, 1980). While the proportion of adults who engage in learning declines as the years roll by—with an especially sharp drop in the early 40s and a long plateau sloping gradually downward thereafter—the older adults who *do* choose to enroll in college courses are motivated by life changes almost as often as their younger counterparts. Those adults who engage in learning activities for reasons other than life transitions see learning as a satisfying activity, one that keeps them mentally alert, gives them an opportunity to meet other people, or just fills up their free time.

Life Transitions Are Different for Younger and Older Adults

Life transitions that precipitate learning are often different for younger and older adults. Adults between the ages of 25 and 65 attribute over half of their learning to career transitions. Far fewer young and mid-life adults engage in learning activities for other reasons, such as family transitions (about 10 percent) or leisure transitions (about 10 percent). In sharp contrast, adults over age 65 attribute most of their learning to leisure transitions (about 40 percent) and family transitions (about 20 percent). This shift in transitions prompting learning begins between the ages of 50 and 65, and intensifies after age 65 (Aslanian and Brickell, 1980).

Younger and Mid-Life Adults' Major Transitions

This pattern can be explained easily. Learning for career purposes dominates young and mid-life adult lives, especially those of men, before retirement at about age 65. Workers need to learn new skills and acquire new knowledge in order to cope with changes in their careers. Adult students view learning as an avenue for getting new or different jobs, earning promotions, or performing in their current jobs. No other area of young and middle-aged adult life—family, health, or leisure—is as turbulent or demands as much learning as one's career.

Older Adults' Life Stage Transitions

Upon retirement, the pace of life slows down for many older adults. Leisure activities become more important, and there is more free time to engage in such activities as travel, hobbies, and crafts. Fewer dramatic changes take place in older adults' lives. For instance, leisure patterns stabilize and older people change residences less often than their children and grandchildren do. The effect of these stabilizations is that most adults over age 65 experience fewer life changes requiring formal training and learning. Not surprisingly, health triggers, as well as religious triggers, become more significant with age. These trends are indicative of declining physical condition in the later years and the human need to reflect on life's meaning and accomplishments as life nears its end.

Life Challenges in the 21st Century

The 21st century, unlike any other period in our history, will offer major challenges to our human resource capabilities. The new age ushers in a period of rapid social, technological, and economic change. This is not to say that the 20th century was marked by stagnation. The closing decades of this century have been turbulent years because of changes in the workplace, family life, the economy, the role of minorities and women, and the age composition of the population. We can expect these changes to occur at an even faster pace in the next century.

Keeping up with societal changes will consume a great deal of energy and require unusual resourcefulness on the part of most Americans. Organizations, too, will face new demands as they seek to meet the requirements of a rapidly changing world.

Business, industry, government agencies, and voluntary associations cannot rely on outdated methods in the next century if they want to meet those demands successfully.

Consequently, we can expect adult life to become even more demanding than it is today, full of life transitions that lead adults from one stage of life to the next, and from one new role to another. Adults of all ages need to develop new competencies to become successful in the roles they have assumed or will assume over a lifetime. Life transitions are times of learning, and it is being in transition that causes most adults to pursue learning activities. Since Americans devote the majority of their time to their careers and families, it is not surprising that changes in these two domains will shape their lives.

In our earlier research on adult development and adult learning (Aslanian and Brickell, 1980), we observed that periods of rapid social change were accompanied by commensurate increases in adult learning. We concluded that the increasing number of life transitions that adults face today is challenging adults to grow and adapt to meet the demands of new roles. This is the environment that explains the widespread participation of adults in educational activities and the rising rate of that participation during the closing decades of the 20th century. Undoubtedly, this trend will continue into a dynamic and challenging 21st century.

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COMMUNITY COLLEGES IN AN AGING SOCIETY

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Community colleges are the largest and fastest growing segment of higher education in the United States. They have emerged as important resources to assist local organizations in addressing a number of pressing national concerns. Yet, despite the fact that American society is aging and the increasing number of older adults will have a major impact on most social and educational institutions, fewer than 25 percent of the nation's 1,224 community colleges currently offer programs designed specifically to meet the needs of older adults. The problem is not one of indifference or lack of resources, but rather a lack of awareness of an aging society's impact and the role community colleges can play in assisting their communities and nation in meeting the challenges posed by changing demographics.

Community Colleges: An Overview

Research in the area of community college programs for older adults is limited and, in most cases, consists of surveys of existing programs and services. Prior to 1989, only two national surveys had been conducted, one by the Adult Education Association (DeCrow, 1974) and the other by the American Association of Community and Junior Colleges (Korim, 1974). Both surveys showed high levels of interest in serving older adults and a wide range of programs to train students and paraprofessionals about aging. However, few institutions actually followed up with programs and activities to serve the diverse needs of an aging society.

Community colleges have grown rapidly since their emergence in the 1960s as a major segment of higher education. These 1,224 institutions enroll over 5 million credit students annually and serve an additional 5 million noncredit students. Enrollments in community college programs represent nearly half of all students enrolled in colleges and universities nationwide. Fifty-five percent of all new students entering college each fall begin at a community college. Community college enrollments continue to grow at annual rates of 5 to 15 percent, while enrollments in other institutions of higher education have stabilized or are declining.

A community college is located within commuting distance of nearly 95 percent of the nation's population, thus making them key institutions for reaching virtually all Americans. Community colleges provide the primary access to higher education for an increasingly large segment of the population. These high-quality, but affordable, programs are a financially prudent higher education alternative that attract students from all economic groups. In particular, minorities and other disadvantaged groups have sought upward social and economic mobility through community college education. These institutions offer students needed occupational and general educational programs and the opportunity to transfer to other institutions of higher education once two-year studies are completed.

Community colleges represent the greatest diversity in higher education, enrolling students of various ages, racial and ethnic backgrounds, and educational and skill levels. They are the only institutions equipped to provide a wide range of programs and services to meet the needs of all their constituents. Special student populations may include those who are underprepared to meet the challenges of the classroom or the workplace, as well as those requiring nontraditional educational programs and services to assist them in leading independent and productive lives. Community colleges have also proven to be particularly effective in meeting the special needs of organizations and agencies in their local communities.

Community colleges' commitment to access has been aided by the rapid pace of technological development. Many have aggressively developed telecommunications capabilities, including broadcast, cable, and satellite transmissions, to reach constituents who cannot easily take advantage of campus-based programs. Community colleges are leading institutions in the delivery of distance education and have demonstrated the capacity to reach out to new students through the use of technology.

Perhaps community colleges' greatest contribution is the leading role they play in their communities and regions. Community college administrators and staff are accustomed to working jointly with a wide variety of community groups, including the League of Women Voters, chambers of commerce, churches, social service organizations, local business and industry, labor unions, and many others. They often serve as the hub for local networks dealing with community problems, ranging from drug education to economic development, from housing to health care.

"A community college is located within commuting distance of nearly 95 percent of the nation's population, thus making them key institutions for reaching virtually all Americans."

An increasing number of business and political leaders at the local, state, and national levels have recognized the critical role that community colleges can play in preparing the nation's workforce to compete effectively in the emerging global economy. That recognition has created high expectations for service from community colleges to meet the needs of all citizens.

Preparing Lifelong Education for an Aging Society

The age distribution of the population in the year 2000 as projected by the U.S. Bureau of the Census clearly shows that the workforce in America is fast becoming older. The 20- to 29-year-old age group, from which most new workers have been recruited in the past, will decline in size from 40.1 million to 34.5 million between 1990 and 2000. At the same time, the age group comprised of adults aged 50 and over will experience dramatic increases in size. Changing demographics are bringing into question how much retirement our society can support as we approach the 21st century.

In general, this large group of mid-life and older people will be healthier, more active, and better-educated than previous generations. Educational attainment levels of older adults are expected to increase from an average of 11.3 years of schooling in 1990 to 12.5 years in the year 2000. Many older adults will explore second, third, and fourth careers. The decrease in the dependency ratio of older workers to retirees will also require that many older persons continue to work and upgrade or develop new job skills. Educational opportunities in the next decade will have to address a broader range of possibilities, including training and upgrading of vocational skills.

While large numbers of older adults will turn to education for job or career related reasons, many will look to education for personal enrichment or practical skill-building purposes. It is widely accepted that older adults are capable of learning, and many are eager to learn. The challenge for educators and educational administrators will be to prepare older adults to cope with societal and personal changes.

> ***"In general, . . . mid-life and older people will be healthier, more active, and better-educated than previous generations."***

Studies have shown that older adults are more actively engaged in educational pursuits than ever before. Although participation rates of older adults in educational activities are increasing, the numbers are small in relation to younger age groups. However, educational trends support the notion that the numbers will continue to grow as emerging cohorts of better-educated older Americans demand additional growth opportunities. The correlation between the extent of formal education and the rate of participation in adult education activities holds true for older as well as younger adults, so the need to begin planning is long overdue.

A number of studies have indicated that rates of participation in educational activities continue to be low for low-income and minority elderly. However, community colleges are successfully recruiting growing numbers of younger low-income and minority students through targeted outreach and recruitment strategies. Such strategies need to be expanded to include low-income and minority older persons as well. Many of them could benefit greatly from the vocational and practical skill courses offered by community colleges.

Senior-specific educational programs, such as Elderhostel, have grown rapidly over the last ten years. Senior centers have also been successful in increasing their educational offerings. However, we are witnessing an "aging in place" phenomenon in senior centers in which the clientele is becoming older and less healthy, creating a social service climate rather than a primarily educational setting. Older adults have shown an interest in community college programs as well. The most popular courses are those offered in flexible formats (generally noncredit) through the community service and continuing education departments.

An equally important aspect of preparing for an aging society is the growing need for paraprofessionals in the "caring industries." Community colleges have long been the primary providers of paraprofessional educational programs. However, such training for an aging society requires additional focus and development. Many of the new human service jobs require education about aging, but faculty often do not have the background to teach gerontology courses. Community college leadership will have to address this growing need in the coming decade.

In summary, to meet the educational needs of the large number of older adults in the next decade and beyond, programs must be developed in the following areas:

- job training and career preparation to assist older adults in meeting the skill requirements of a changing workplace so that they can continue to contribute to the nation's workforce and enhance their own economic well-being;
- practical life skills to assist older adults in effectively coping with changing social, economic, and technological demands;
- educational opportunities for personal enrichment to assist older adults in their pursuit of lifelong learning; and
- training for caregivers of older adults to insure that skilled professionals and paraprofessionals in the medical and social service fields will continue to be available for an aging population.

Community colleges are uniquely positioned to provide these educational opportunities at the local level where they will be most effective and reach the greatest number of learners of all ages.

AARP and the League for Innovation in the Community College: A Partnership

Through recent strategic planning efforts, AARP's Institute of Lifetime Learning has redirected its focus from learning for enrichment and personal development to greater emphasis on education to meet older adults' most immediate and practical needs. In doing so, AARP has chosen community colleges as the most appropriate delivery mechanism for enhancing opportunities for older persons to obtain practical, skill-building education.

In 1988, AARP began working with the League for Innovation in the

Community College to explore the provision of services and programs for older adults in the nation's community colleges. AARP was also interested in encouraging the use of AARP materials and curriculum in community college courses and programs.

AARP and the League have developed a positive, working partnership, and in the fall of 1989, the two organizations conducted a survey of community college administrators nationwide to examine the programs and services they provide for older adults in their communities (Doucette and Ventura-Merkel, 1991).

Survey Results: Community College Programs and Services for Older Adults

Overview

The purpose of the survey was to determine:

- the extent and nature of community college programs designed for older adults;
- delivery formats used for such programs;
- the extent and nature of caregiver training provided by community colleges;
- obstacles that prevent community colleges from providing programs and services for older adults; and,
- how older adult programs are organized within community colleges.

The survey instrument was sent to all 1,288 community, junior, technical, and two-year branch colleges in the United States. Each college also received a postcard to return if they had no programs and services for older adults.

Slightly more than half of the institutions surveyed responded in some manner. Of that number, 388, or 30 percent of the total sample, returned completed surveys. Roughly half of the responding colleges reported either no programs specifically designed for older adults or no significant participation by older adults in regular college programs. An approximately equal number (45%) indicated that they offer at least some programs designed specifically for older persons.

Almost three-fourths of the responding colleges were community colleges, and the vast majority were publicly controlled. Median enrollment was 4,372 students, with nearly one-third (31%) reporting an enrollment of less than 2,500 students enrolled in courses for credit. While detailed results are included in a report of the survey, the following findings provide a general summary of what the data revealed (Doucette and Ventura-Merkel, 1991).

Types of Programs Offered

Programs most often provided for older adults generally fall into three categories: financial management skills (retirement financial planning; wills, probates and trusts; and savings and investments); health and cultural enrichment (arts and crafts; exercise; nutrition; trips; and humanities and social sciences); and contemporary civic issues (technological literacy; political issues; and civic concerns).

Programs specifically designed for older adults are most often offered by community colleges and offered less often by technical institutes and two-year branch campuses. Colleges located in suburban areas offer special programs for older students more often than do urban and rural colleges. And larger colleges appear more likely than smaller institutions to offer such programs.

Future Program Needs

Programming is most needed in areas dealing with physical and mental health. Topics of particular interest include selecting health care providers, dental health education, smoking cessation, long-term care services, mental health education, and coping with loss and grieving. Other high priority programming needs include leadership development training and courses about retirement lifestyle options. Perceptions of programming needs were not noticeably different as a function of service area or size of institution.

Program Organization and Delivery Format

More than two-thirds of older adult programs (68%) are coordinated by a single office, most often the office of continuing education and community services. In approximately two-thirds of the cases, this office is headed by a director or a dean or assistant/associate dean.

Most often older adult courses are noncredit (82%), taught in person (99%), in group settings (90%), and consist of multiple sessions (78%). Slightly more than half of the older adult programs and services are offered on campus (52%).

Delivery formats judged to be most effective were multiple session courses and seminars (93%), and single session workshops and presentations (86%). Those judged least effective were telecourses (14%) and credit courses (12%). Interestingly, a majority of responding colleges had not used delivery formats employing widely available electronic media such as home computers and VCRs and telecourses.

Instructor-prepared materials (95%), and slides, video and audio tapes, and overheads (90%) were judged to be the most effective instructional materials and methods.

Visiting, adjunct, or part-time instructors (95%) and selected professionals in the field (93%) were rated as the most effective staff. Slightly more than 80 percent of respondents also felt that regular, full-time college instructors were either very effective or generally effective.

Brochures, posters, and fliers (94%), and newspaper advertisements or articles were rated as the most effective publicity efforts. Cable or public access television was judged to be the least effective type of publicity (13%), and broadcast television was the medium that most respondents had not used (56%).

Caregiver Training

Few community colleges offer caregiver training for professionals, paraprofessionals, and volunteers. Only one in ten responding colleges offers any formal, credit caregiver training leading to some type of certification. Noncredit training is offered only slightly more often, with roughly 10 to 20 percent of responding colleges indicating they have such training available. The majority of responding colleges offer no training for volunteer caregivers.

Obstacles to Increased Programming for Older Adults

Almost three-fourths of the responding colleges cited lack of funding as the most serious obstacle to increased programming for older adults. Lack of trained staff and difficulty reaching older adults were each cited as obstacles by roughly one-third of the respondents. Lack of funding was listed more often by suburban and urban institutions than those in rural areas. On the other hand, difficulty reaching older adults was cited as a problem more often by rural colleges, and lack of trained staff was a difficulty for urban colleges.

Curriculum materials (63%) and publications to give as handouts (58%) were the two types of assistance most often needed by responding institutions. Nearly 40 percent of the colleges indicated a need for technical assistance, and slightly more than one-third reported a need for additional staff training.

Summary and Conclusions

The survey's most striking finding is that less than one-fourth of two-year colleges in the United States offer programs and services designed specifically for older adults. This result is particularly significant in light of current demographic trends which show rapid growth in this age group.

In colleges that do offer older adult programs, course offerings are concentrated in traditional topic areas such as financial management, recreation, and cultural enrichment. Current program planning and implementation efforts do not seem to reflect the changing complexion of this age group. Specifically, training for self-employment and post-retirement occupations, volunteer and leadership skills, and various health topics appears to be lacking. One would expect courses in these areas to be in increasingly greater demand by an older adult population that is healthier and living longer than previous generations and will thus be looking for meaningful life experiences for many years after retirement.

> ***"Less than one-fourth of two-year and community colleges in the United States offer programs and services designed specifically for older adults."***

Remarkably, few colleges offer any type of caregiver training. It may be necessary for two-year colleges to aggressively seek cooperative arrangements with both public and private agencies to establish caregiver training programs to address the vast personnel needs of an aging population.

By far, lack of adequate funding seems to be the greatest obstacle to increased programming for older adults, although lack of trained staff and difficulty reaching the target population were also mentioned by a significant number of responding colleges.

In summary, there seems to be little that is innovative, either in program content or instructional methodology, in the programming offered for older adults in two-year colleges. If two-year colleges are to offer programs and services that are responsive to the changing needs of older adults, these practices will need to undergo serious examination and revision.

Despite the fact that most currently do not offer comprehensive or coordinated programs for older adults, community colleges have a critical role to play in the education of Americans of all ages. Not only are they the largest and fastest growing segment of higher education in the United States, but they are uniquely positioned to link national issues to those on a local level.

In 1989, Michael Crawford, Chancellor of St. Louis Community College, said, "Community college leaders . . . have a window of opportunity to be powerful forces to help the transition of the nation into the new realities of the 21st century" (Crawford, 1989). One of the new realities of the 21st century is an aging America. The time is now for community colleges and their leaders to become powerful forces in addressing this new reality. They have the potential to be leaders in developing effective programs and services to meet the needs of a changing and diverse older adult population.

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RESOURCEFUL ROLES: STUDENTS/LEARNERS

LIFESPAN DEVELOPMENT AND LIFELONG LEARNING

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In the past 20 years, there has been significant interest and research in psychological development across the lifespan. Erik Erikson (1963) was among the early theorists who presented a concept of personality development that incorporated adulthood. He defined his stages in terms of developmental tasks associated with a particular time of life, starting with the infant's need to develop trust and continuing throughout the lifespan.

Erikson's seventh and eighth stages encompass adulthood and old age. The seventh life stage is labeled "Generativity vs. Stagnation." Generativity "is primarily the concern for establishing and guiding the next generation" (Erikson, 1968, 138). This stage is characterized by productivity and creativity; the individual derives a sense of fulfillment from nurturing and educating the next generation and strengthening the institutions which support generativity. If these tasks are not undertaken, the result is a feeling of stagnation and accomplishing nothing important.

Erikson's eighth and final developmental stage is called "Ego Integrity vs. Despair." Ego Integrity develops "in the aging person who has taken care of things and people and has adapted himself to the triumphs and disappointments" of life (Erikson, 1968, 139). It embodies a sense of a life well-lived. Feeling that one has not led a meaningful life and realizing that time is too short to make significant changes creates a sense of regret and despair in some older adults.

More recent theorists in lifespan psychosocial development also identify age- or stage-related developmental tasks. One task in adult development identified by several theorists is a deepening of one's understanding of what Levinson refers to as the "pattern of relationships between the self and the world" (1986, 3). He perceives the life structure as having "an inner-psychological aspect and an external-social aspect" (Levinson, 1986, 12).

How better to develop and fulfill our psychological and social selves than through the process of lifespan learning? How can older people effectively perform their generative tasks, that is, the nurturing, education, and acculturation of the next generation, if they do not commit themselves to their own continuing education? Can they maintain and improve the institutions which promote generativity without devoting themselves to lifelong education? How much will education across the lifespan contribute to an understanding of the individual's relationship to the world and increase the likelihood of achieving Ego Integrity in old age?

By lifespan learning I am not suggesting a lifetime in the classroom, although more and more adults are returning to school at all levels, whether it is for career enhancement, instrumental learning, or for enjoyment and personal growth. By lifetime learning, I mean staying engaged in the changing world, enhancing our understanding of and pleasure in life, and reaching for a better grasp of the complex issues that confront us daily.

Cognitive Development Over the Lifespan

What about intellectual development over the lifespan? Do adults continue to be cognitively intact into old age? The research indicates that, barring underlying diseases, older adults continue to perform quite well intellectually, at least until about age 70. Carroll Kennedy at Kansas State University states that "effective academic endeavors can be carried on by most adults well into their 70s" (1989, 181).

K. Warner Schaie (1977-78), who has a long history of research in the area of developmental changes in adult intelligence, has advanced a theory encompassing five stages of adult cognitive development. Some aspects of Schaie's stages are similar to Erikson's stages of personality development. For example, because the young of the human species require so many years of rearing before they reach young adulthood and independence, Schaie recognized that adult cognitive skills are essential "to the survival, protection, and acculturation of the next generation" (Schaie, 1977-78, 131), elements also found in Erikson's Generativity Stage.

Schaie's (1977-78) five stages of adult cognitive development are the acquisitive, achieving, responsible, executive, and reintegrative stages. The final two stages are most significant in a discussion of cognitive development in old age.

The Executive Stage demands a broadening of responsibility from the more circumscribed family unit in earlier stages to larger societal systems. Cognitive strategies must extend to integration of complex, higher-order relationships.

"How can older people effectively perform their generative tasks, that is, the nurturing, education, and acculturation of the next generation, if they do not commit themselves to their own continuing education?"

The Reintegrative Stage is the final phase of cognitive development and occurs in old age. Schaie suggests that cognitive processes at this stage, more than ever before, are influenced by individual motivation and attitudes. He believes that this stage emerges "when the complexity of the adult cognitive structure has reached an overload stage and consequently demands simplification" (Schaie, 1977-78, 135). At the same time, the number and complexity of life roles tend to be reduced because of retirement and release from the responsibilities of children and families. This stage has sometimes been called "disengagement," but Schaie (1977-78) does not perceive cognitive activity at this time to be at all disengaged. Rather, it is engaged in selective attention to the most meaningful aspects of life or to those issues which reflect the greatest personal value. Problem-solving is oriented toward situations which the elderly individual believes hold the greatest personal importance.

Conclusion

Understanding that age-related and individual differences in cognitive and learning styles do exist is important for both older learners and their teachers. If Schaie (1977-78) is correct about the Reintegrative Stage of lifespan cognitive development, then older adults must be more concerned with *what they do* with their knowledge in old age than with *how much* they are learning. Perhaps this tendency toward selectivity in intellectual endeavors contributes to what Schaie refers to as "the wisdom of old age" (1977-78, 135).

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THE OASIS PROGRAM

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OASIS (Older Adult Services and Information System) is a national, nonprofit membership organization, founded in St. Louis in 1982. Currently, 25 OASIS facilities in 20 cities across the United States serve approximately 120,000 members. The educational, cultural, and wellness programs offered serve a target audience of healthy, mobile older adults.

Our goal is to provide older adults with an opportunity to study subjects they may not have had the chance to explore previously. We at OASIS believe very strongly that healthy older adults comprise a majority of the aged population. Of necessity, many programs for older persons have been aimed at the frail elderly. OASIS is not one of those.

Perceptions of Older Adults as Learners

We've talked about perceptions of older adults and learning. I think that's one of our biggest concerns at OASIS. Everyone has a story to tell, so I'll briefly share why I came to OASIS. I met OASIS Director Marylen Mann about three years ago when I moved to St. Louis, and she asked me to join the OASIS staff. I felt that given my corporate background, OASIS would not have an appropriate position for me. I could not envision working at a nonprofit organization, particularly with older adults. I had some very common misconceptions about older adults. But I agreed to visit one of the OASIS facilities to observe a class and to find out a little more about what OASIS was offering.

> ***"The older learner is everything that he or she was earlier in life . . . with the same desire for variety and excitement."***

I arrived a little late and sat down in the back of the room next to this "little old lady." (I'm relating to you my perceptions at the time.) The program was a contemporary issues program, and the lecturer was a young man who had been a Marine sergeant at the time of the takeover of the U.S. embassy in Iran. He talked about his imprisonment for 433 days and described his life during that time. During the course of his talk, it was obvious that the lady next to me was having considerable difficulty breathing. She also appeared to be suffering from arthritis and was very stooped. I sat there thinking, "This woman's going to die on me in the middle of this class. She's just going to fall over and die." Her breathing was very labored and became more so as the program went on.

After the program was over, she turned to me and said, "Why are you here? You're obviously not a member." And, we began to talk.

The young lecturer had no appreciation of Iran's politics, history, religion, or culture. But the "little old lady" next to me not only had a phenomenal appreciation of all of those things, but she had a wonderful understanding of the whole Middle East situation. She had one of the most acute minds I had ever encountered. She and I sat there for an hour-and-a-half after everyone else had gone and talked. It was one of the most stimulating conversations I had had in months. She convinced me that maybe I *could* work with older people after all.

Not all of our members are as sharp as that lady was. But despite the aging of her body, her mind was still strong and vital. Those are the kinds of people that OASIS tries to reach. They all have different reasons for wanting to learn and different levels of capability.

Factors Affecting Participation in OASIS Programs

Motivation is a key concern when we discuss adult learners. A number of factors contribute to participation in programs by our membership. One issue is time. For many older adults, retirement provides the first opportunity for real leisure time to pursue their interests. Others find themselves with extra time that they need to fill. Because our members have a wide variety of interests and needs, we offer a vast array of programs such as drawing, painting, creative writing, literature, history, and wellness programs.

"Variety Is The Spice of Life" at OASIS

Wellness Programs

At OASIS, there's a heavy emphasis on wellness and on modifying one's lifestyle to remain healthy as long as possible. In 19 of our 20 cities, we have hospital sponsors, an integral piece of our partnership with the community. They not only provide financial assistance to OASIS, but they also furnish teachers and materials for all of our wellness programs. The teachers may be doctors, nurses, nutritionists, therapists, podiatrists, ophthalmologists, or other hospital staff. They come to our facilities to teach our members, and even more significantly, to answer our members' questions. For example, an all-day program by a group of cardiologists helps members understand various heart diseases and learn about healthy lifestyles. It's a comprehensive health course, one of many we offer on a variety of health issues.

Arts and Cultural Programs

We strive for high quality and variety in our educational programs. We do not generally offer arts and crafts classes or recreational programs because we feel those are provided in other locations. We work closely with cultural organizations in each of our cities to offer a rich variety of programs in the arts. For example, the theater course is a popular one among our members. Rather than relying on the traditional lecture style for this course, one class may be taught by a set designer from a local theater who explains what goes on to put a production together. Another class meeting may find the make-up people or the costume people addressing the students and answering questions. Yet another class session may include the director explaining not only the play's plot, but also the fine points of directing a cast. Finally, having learned about the different aspects of a dramatic production, class members actually attend a performance.

OASIS Members as Active Participants

OASIS members provide the inspiration for many of our course offerings. They're always about three steps ahead of us in coming up with ideas, and they're very vocal in expressing their interests. We try to satisfy those desires. The older learner is everything that he or she was earlier in life, perhaps at a different pace or at a different level, but with the same desire for variety and excitement.

COLLEGE AND UNIVERSITY PROGRAMS FOR OLDER ADULTS

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Overview of College and University Programs for Older Adults

Colleges and universities in the United States serve older adults in a variety of ways. Academic opportunities available to older persons include free or discounted tuition for older students wanting to take regular college courses, and specially-designed continuing education courses to assist individuals in dealing with the challenges of retirement and growing older. Short-term academic programs, such as those offered by Elderhostel, are designed to attract older persons from all parts of the country to a campus or other college-owned facility for a one- or two-week intensive educational experience. In fact, Elderhostel has created an Office of Institute Support and Development to assist both retired persons and colleges and universities that want to start such programs.

Institutions of higher education provide other services that benefit older adults as well. Re-entry assistance, counseling, and financial aid are valuable services for older persons wanting to earn a degree or prepare for a career change. And many colleges and universities support gerontology centers that conduct research on aging and offer limited educational opportunities for older students.

Institutes for Learning in Retirement

Today, I am going to focus on those educational programs that are organized as centers or institutes serving older persons in the local college or university community. These programs vary greatly in title, administration, location within the institution, structure, and size. Among institutes for learning in retirement, differences are readily apparent in curricular formats and subject matter, fee arrangements, physical location, and many other aspects. But most of these centers do have certain characteristics in common.

Centers or institutes for older students are designed to serve the learning needs and interests of older adults located within commuting distance of the program. Their major purpose is to offer a broad range of educational programs, many of which provide college-level learning experiences. Institutes are usually sponsored by an accredited college or university, or another institution or organization working in collaboration with an accredited college or university. In a few cases, where a non-college or university institution is judged to be sponsoring a program comparable to those found at accredited colleges and universities, programs have been set up outside of the traditional higher education setting.

In keeping with the college and university environment in which they are housed, institutes for learning in retirement generally use instructors or course leaders who are regular faculty members of the sponsoring institution or who have been selected by the faculty or by a curriculum committee consisting of participants in the program. Centers should provide for meaningful participant involvement in planning, evaluating, teaching, and, where appropriate, administering the program.

> ***"Institutes for learning in retirement offer a broad range of educational programs, many of which provide college-level learning experiences."***

In order to attract a good mix of older adult learners from across the local community, it is essential that centers commit themselves to affirmative action goals. They should be nonprofit, charge a relatively modest tuition or membership fee, and have a need-based scholarship program. Beyond the classroom, centers should offer social, cultural, and physical experiences that complement the curriculum and that are appropriate for the program participants.

Expansion of College and University Programs for Older Adults

During the 1980s, college and university programs for older adults became increasingly popular, and education and aging professionals have taken note of their success. The National University Continuing Education Association (NUCEA), in cooperation with the American Council on Education (ACE) and Macmillan Publishers, will soon publish a book on these college and university centers called *Students of the Third Age* (forthcoming). NUCEA has also established a division within its organization for professional continuing educators involved in administering these programs. AARP has published a directory of college and university programs for older adults as well as a manual on how to start a program (American Association of Retired Persons, 1986 and 1987).

The growth of college and university programs across the country has prompted a number of colleges and universities on the West Coast to form an organization called ALIROW (Association of Learning in Retirement Organizations West). The member institutions are working to stimulate the development of similar organizations in other parts of the country.

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PROJECT LEEP

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I am pleased to have the opportunity to share with you a literacy project launched by the National Council on the Aging (NCOA) in the early 1980s. The project revealed a great deal about illiteracy among older adults: their needs, concerns, and motivations, and the techniques and methods that best address the problem.

Background

The literacy project was an outgrowth of an earlier undertaking designed to develop educational goals for older adults. A survey conducted for the goals project revealed that a significant percentage of older people did not have the basic skills needed to function in society. Without basic skills, the likelihood of older adults expanding their knowledge base was remote. This lack of basic skills affected health care and access to services and entitlements. Unable to read, some older adults were vulnerable to possible abuse, loss of independence, and being locked into menial and low-paying jobs. Thus, illiteracy was not only an individual problem but one with extensive ramifications for an aging society.

Project LEEP (Literacy Education for the Elderly Project) was a pioneer effort in 1984. Prior to that time, the literacy needs of the elderly had largely been ignored.

Through LEEP, NCOA underscored the need to address the hidden problem of illiteracy among older people. Furthermore, the LEEP Project helped program planners develop strategies for reaching older people in need.

Project Objectives

The project had four major objectives:

1. To link, at the local level, the aging services network (senior centers, offices on aging, senior housing projects, etc.) with the volunteer adult literacy network (Literacy Volunteers of America, Laubach Literacy Action, and other community groups, including libraries and churches).
2. To recruit and train older adults as volunteer literacy tutors and peer supports for other older adults who lacked basic literacy skills.
3. To deliver literacy education to older adults at sites where they congregated in large numbers.
4. To provide literacy tutors and trainers with materials on how to address the special learning needs of older adults.

To meet these objectives, 25 sites were invited to organize literacy projects for older adults. It was a risky undertaking because no funding was available in the grant to assist the demonstration sites.

However, the response to the call for demonstration sites was overwhelming. A need that had long existed had been identified, and LEEP was able to provide a structure to address the problem.

The sites represented a variety of sponsors, including libraries, senior centers, city offices on aging, and area agencies on aging. Each operated independently, using existing resources to implement the program. In addition, a number of education sites were able to obtain 310 education money or library funding to support the project.

NCOA functioned as coordinator, providing guidelines and technical assistance. Each of the 25 selected sites received instructions on how to proceed, handbooks on tutoring older adults, and a timeline for the project.

Special Considerations When Working with Older Literacy Students

Project LEEP enabled NCOA to gather information on methods, techniques, and procedures used to recruit, train, and work with functionally illiterate older adults. I'd like to share some of these findings with you.

1. *Older adults are differently motivated than younger learners.* Younger adults are frequently motivated by the need for employment or better employment. Older learners are more concerned with self-esteem, independence, life enrichment, and the completion of unrealized goals.
2. *Older adults need an anxiety-free and supportive learning environment.* Many older adults harbor anxieties and uncertainties about their capacity to learn. Often an overpowering fear of failure needs to be dispelled. Older adults need constant encouragement and praise to build self-confidence and self-esteem.
3. *Older adults need to be involved in the learning process.* Older adults offer a rich resource in the learning process. They have life experience as workers, parents, spouses, and citizens that can be built into the learning situation and can strengthen the learning outcome.
4. *Older adults need and want learning experiences that are relevant and future-oriented.* Older students more readily learn information they can apply directly in their daily lives. Learning is better achieved if it is life-centered, task-oriented, or problem-solving.
5. *Older adults need to be treated as individuals capable of self-direction and free from coercion.* Older adults learn more quickly in a situation that is characterized by mutual trust and respect and where joy and commitment to the learning process abound.

> ***"Most adults will not 'volunteer' for a literacy program. Many already view themselves as failures because they cannot read; they will not willingly set themselves up to fail again."***

There are some physical needs that must be considered in the older adult learning situation. These may require compensation and adjustment. Diminishing eyesight requires good lighting, reduced hearing requires amplification, and declining energy levels require shorter sessions. In addition, slower response rates require pacing the instruction, and restricted mobility suggests that educational services be made available at convenient times and places.

Student Recruitment

Recruitment was the most difficult aspect of the project. Most adults will not "volunteer" for a literacy program. They have become skilled at hiding their illiteracy. Many already view themselves as failures because they cannot read; they will not willingly set themselves up to fail again. Many older adults feel they are too old to learn. They need the encouragement of a trusted person in their lives in order to take the first step. Consequently, recruiting efforts need to be aimed at those community resources that have access to the nonreading elderly and have established a relationship with them. These may include health clinics, social service and community action agencies, senior centers, and churches.

Conclusion

Illiteracy may not be older adults' biggest problem—although illiteracy may compound their other problems. Some may need assistance in approaching other life situations before they can turn their attention to literacy skills. Nevertheless, Project LEEP confirmed that older adults with literacy needs, given the proper environment and opportunities, will participate in the learning process.

Reflections

I would like to close with some moving comments shared by one of the coordinators of LEEP from Onancock, Virginia:

> I have learned, for instance, that many of our seniors are hungry because they do not know how to apply for food stamps and other services that might be available to them. I know that many of them suffer ill health because they cannot read the labels on their medicine bottles. I know that some elderly persons never eat out because they do not know how to read a menu. I know that more people than I care to imagine live in isolation because they do not know how to use the telephone.
>
> But I will never know the daily pain that our nonreading elderly endure, living in a world that assumes a certain level of literacy for all persons. I do not know what it is like for them to shop for groceries with the meager funds available to them without knowing whether they have enough money.
>
> I cannot know what it means not to have a bank account, not to be able

to vote in the greatest democracy in the world, not to be able to sign a child's report card, or sign a release form allowing the doctor to perform life-saving surgery.

One of our students told me about a time when she had surgery and was in the hospital for several days. "I got dozens of beautiful cards and flowers," she explained with tears in her eyes, "and I have no idea who sent them." I do not, I confess, know anything about that kind of suffering.

But I know first-hand the gratitude of our students when they begin to unlock the chains of illiteracy that have bound them for so long. I see the pride in their faces when they first recognize the name of the town where they live. I see the gleam in their eyes when they hold their first book—and know what it contains. I feel their gratitude when one of our students who lives in a shack without running water insists that her tutor take a dollar from her as a token of appreciation.

Project LEEP was not the kind of job I was looking for last fall, and some nights when it wakes me up, I want to give it back. But I am driven to continue, not by what I have taught anyone, but by what my students have taught me.

COMPUTERS FOR SENIORS

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The Beginning of a Computer Network for Seniors

SeniorNet is a nonprofit membership organization for older adults that began in early 1986 at the University of San Francisco. It was founded by Mary Furlong, a professor of education at the University of San Francisco.

But SeniorNet's real roots are right here in Washington, D.C. In the early 1980s, Mary Furlong was a professor at Catholic University. She and a colleague began buying computers at Toys 'R' Us, and finding used television sets to use as monitors. They carted their make-shift computers from one church basement to another, introducing older people to the uses of computers. Out of this experience came Mary's vision of today's SeniorNet.

It took Mary several years of persistence, vision, and courage to bring SeniorNet into being. In 1985, the John and Mary Markle Foundation of New York saw the possibilities of a computer program for seniors and became our core financial supporter. Apple Computer supplied computer equipment to get SeniorNet started at five teaching sites and in the homes of several computer neophytes.

SeniorNet Today

SeniorNet is organized around four basic goals:

1. To teach computer skills to older adults in an enjoyable and friendly way.
2. To give older adults the opportunity to learn skills that will enable them to contribute their knowledge and wisdom to society.
3. To offer a means for older adults to communicate and make new friends through an on-line computer network.
4. To conduct research on the use of technology by older adults.

I believe that our first two goals are really two sides of the same coin. That is, our members receive instruction on the use of computer technology, and they use the technology to share their knowledge with others. The third goal refers to our on-line network, a unique feature of SeniorNet. And, as an educator, Mary Furlong is deeply interested in the research applications of our work, as reflected in our fourth goal.

To address these goals, SeniorNet serves its members through a variety of vehicles. There are now nearly 40 teaching sites in the United States and

Canada where members can learn to use computers. SeniorNet also serves many independent members who do not live near a SeniorNet site. Currently, SeniorNet has approximately 4,000 members who access the network both at program sites and in their own homes. Members receive a quarterly newsletter which features articles about computer use, reviews of software and hardware, and news of projects conducted by our members.

SeniorNet's unique feature is its on-line computer network through which members can communicate with one another, both seeking and giving information. SeniorNet publications, such as *Computers for Kids Over Sixty* (Kearsley and Furlong, 1990), are also available to members. The annual SeniorNet Conference serves as a forum for members and sponsors to participate in training and information-sharing sessions.

SeniorNet Sites

SeniorNet sites are places where newcomers to computing can come to learn about using computers and can find other seniors with similar interests. Each site is sponsored locally by an organization with an interest in reaching out to older people. SeniorNet sponsors include telephone companies, banks, senior health organizations, employment agencies, and ophthalmology practices. The sponsors provide the computer equipment and contribute to the cost of establishing and maintaining the sites, which are often located in senior centers, community facilities, clinics, or other similar locations. SeniorNet works with its local sponsors to organize the sites, and provides lesson plans and teaching materials, access to the network, and continuing support.

"We know that seniors are capable of and interested in seeking and sharing knowledge . . . [T]he computer is a wonderful tool to facilitate this exchange."

SeniorNet sites are run on senior volunteer power. It is the older people themselves who have computer skills and are willing to share them by training new members. SeniorNet volunteers are rapidly breaking down stereotypes about older adults and their involvement—or lack of involvement—with technology. First of all, there are lots of seniors out there who have computer skills. Secondly, and probably most startling to many people, there is a real hunger among seniors to learn about this new technology, technology that came about long after they were in school, and even after many of them retired from the business world. Every one of our sites has a long waiting list of people eager to take computer classes.

Independent SeniorNet Members

Many of our members do not live near a SeniorNet site. Some of these independent members have their own computers and know how to use them. Others have been given one—perhaps by a son or daughter—know how to turn it on, and want to learn more about using it. Some members are thinking about buying a computer and want to get more information about them. Still others are computer experts.

SeniorNet members are demonstrating to the world that they are able, seeking, and sharing people. One article about SeniorNet carried a headline that said, "Old Dogs Learn New Tricks." I'm not crazy about the choice of words, but that headline certainly helps make the point that we're surprising a lot of people. In fact, all of the national news attention we've received points to the stereotype of older people: seniors and computers are *news!*

SeniorNet On-Line

SeniorNet On-line is our unique computer network for seniors. Any member with a computer and a modem (which someone has defined as a telephone for a computer) can access our network. This is rapidly becoming the means by which a real, though geographically diverse, community is evolving. Like other communities, the SeniorNet on-line community has a number of ways of communicating: private conversations; electronic mail; public statements, with subsequent agreements and debates; network forums, which are almost like town meetings; and the seeking and giving of information through databases and special interest groups. Our network is the way we come together in whatever manner suits us at the moment.

A wonderful example of this community working together occurred right after the Loma Prieta earthquake. When I finally was able to get on-line that evening, I was astounded by the number of messages I found. People were not only using the network to find out if their on-line friends were all right, but they were also offering to help in any way they could (including passing on messages to others). That night, I knew that we had truly built a community.

SeniorNet Publications

Our publications are also a two-way street. Our newsletter features information flowing both to and from our members. One of our new publications will be a *SeniorNet Sourcebook*, a compendium of ways our members have put technology to use, with suggestions and ideas for adaptations. Other publications, such as *How To Buy a Computer* (SeniorNet, in press), are written with a great deal of input from our members.

SeniorNet Research on Seniors and Technology

As educators, we keep our research efforts in the forefront of our planning. Mary Furlong has contributed articles to several journals, and we publish periodic reports on SeniorNet's progress and findings.

Financial Support

As I mentioned earlier, our sites are locally sponsored. In addition, SeniorNet has received support from a number of corporations and businesses for specific projects, such as our publications and the annual conference. The John and Mary Markle Foundation has continued its generous core financial support and valuable guidance.

Conclusion

SeniorNet epitomizes the theme of this conference: resourceful aging. We know that seniors are capable of and interested in seeking and sharing knowledge. And we have found that the computer is a wonderful tool to facilitate this exchange. Through SeniorNet, we're not only learning a lot, but we're also having a lot of fun!

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RESOURCEFUL ROLES: TEACHERS/MENTORS

MENTORING MOTIVATES LEARNING THROUGHOUT THE LIFESPAN

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The challenges of a rapidly changing society create the context for lifelong learning. Choosing the best course of action from a variety of options involves securing, understanding, and evaluating current information and new possibilities. In addition, the lifelong learner must integrate the information into a system of beliefs and actions based on personal, family, and community value systems. Making choices that lead to healthy aging requires thinking, learning, and clarification of values until the very end of life.

Lifelong learning activities cannot be contained in a classroom, a workshop series, or even a best-selling self-help book on positive and healthy aging. As helpful as those efforts may be, learning about aging does not necessarily equip the learner to age successfully. In addition to information, positive role models and experiences with well-adjusted older adults are also needed.

Participatory learning begins early in life as young people assist older family members, friends, or neighbors with various tasks. This provides youth with opportunities to understand and belong to the natural life cycle. Older persons participate in nurturing young relatives and friends by sharing information and stories about the family's background, values, and life-coping skills. Hopes and expectations for the future generation can be communicated from older to younger family members. Through these exchanges, older adults complete the developmental tasks of life's end, and youth receive invaluable assistance in the development of mind and spirit. In the process, a rehearsal for the younger members' own future takes place.

These intergenerational exchanges occur naturally in extended families or in age-integrated living communities. When age groups are segregated, such as in retirement housing, intergenerational programs in schools and other public settings can serve to establish the service/learning connections so vital to the well-being of all generations.

Prototypes of these programs exist in many places. The Teaching-Learning Communities (T-LC) Mentors Program, begun in 1986 in the Ann Arbor, Michigan, public schools is an application of the well-known T-LC Program.[1] Older volunteer mentors are linked with adolescents at-risk of dropping out of school. The intergenerational pairs meet together at least once a week in a school setting. The mentor's primary function is to assist in raising the youth's self-esteem and self-awareness. Mentors help their student companions identify their strengths and establish realistic educational and career goals. Special educational experiences in areas of competence can help students reach those goals. Tutorial assistance plays a significant part in building skills and confidence in subject areas where there are weaknesses.

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[1] An intergenerational prevention model for youth ages preschool through grade 12 at risk of school dropout.

> ***"When young people understand and experience the value of older people and begin to cherish them, they get a glimpse of what the latter part of life is like. Then, as they age, they can make choices that will lead to their own healthy aging."***

Issues of freedom and responsibility are at the center of the lifelong learning process. Mentors work with students to empower them to make positive choices in their lives, even when they are confronted with tough decisions, often before they have the experience to evaluate the long-range consequences of their actions. Some of these challenges include staying in school, remaining free of drug and alcohol abuse, understanding and assuming responsibility for their emerging sexuality, and respecting the law and the rights of others.

There are benefits for the volunteer mentors as well as the students they serve. They find a sense of value, purpose, and belonging in a society which often sets older people aside. They experience strengthened physical and mental health, and they, too, through mentoring, discover opportunities for lifelong learning.

In the community, positive outcomes touch everyone's life in significant ways. Intergenerational bonds strengthen families, schools, and neighborhoods and often result in meaningful sharing of historical and cultural traditions. Informal networks of caring spring up to deal with crisis situations as well as the joys and concerns of everyday life. Finally, intergenerational service/learning programs are cost effective. Coordination, educational materials, and transportation represent their primary costs.

We are all served when young people participate in the care of older adults, and older people provide mentoring and support for young learners. When young people understand and experience the value of older people and begin to cherish them, they get a glimpse of what the latter part of life is like. Then, as they age, they can make choices that will lead to their own healthy aging. Through this process, the lifespan comes full circle to begin afresh in positive ways with new generations.

TRAINING MACHINISTS FOR THE 21ST CENTURY

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I'm an operating officer of Focus: HOPE, a civil and human rights organization founded in Detroit in 1968. Focus: HOPE operates a wide variety of programs to help people in the Detroit area. We run the single largest feeding program for mothers, infants, children, and senior citizens in the United States. Every month we feed approximately 80,000 to 85,000 people. About 45,000 of the people who come to us are women, infants, and children up to six years old; about 35,000 are elderly persons on extraordinarily limited incomes.

What do these programs have to do with training? Food programs are what we call "maintenance" programs. In general, if you're actively employed, you can take care of your kids, and if your old folks can't take care of themselves anymore, you can take care of them, too. So, in 1981, we shifted away from our focus on maintenance programs, and we began to concentrate on what we call "empowerment" programs, programs that teach people skills so that they can take care of themselves.

The State of the Nation Today

For the next few minutes, I'm going to set the stage for my discussion of Focus: HOPE's training programs by presenting you with a series of news headlines. It's amazing what scanning current newspapers and magazines can tell you about the state of society today. I find these trends both disturbing and challenging.

On crime in our cities:

- The highest incidence of conviction for crimes against property occurs at age 16. The highest incidence of conviction for crimes against persons in the United States occurs at age 18.
- A recent study of crime in Detroit reports that the leading cause of death in Detroit among black males ages 10 to 18 is homicide (Watson and Anstett, 1990). As recently as three years ago, youths age 18 to 25 were more likely to be victims of homicides.
- More black males are incarcerated in the United States than are in institutions of higher learning.

On education:

- In 1984, 15,000 students started 9th grade in the city of Detroit. In 1988, 7,000 graduated. Of the 7,000 who graduated, 1,000 were deemed capable of attending a four-year university or community college, or had some skill that would place them in jobs other than flipping hamburgers. That's only 1,000 out of the original 15,000 that had started!

- Looking across the United States, a large number of young people are not going to college. But a sizeable portion of them are high school graduates. Those folks may spend six or seven years floating from job to job until they stabilize in a field in which they'll work for the rest of their productive lives, assuming they even get a job. I'm not just talking about minorities and women. I'm talking about white males.

More bliss from the business page:

- In 1987, the Japanese graduated 75,000 engineers. That same year, the United States graduated 72,000 engineers. In 1987, Japan had half our population.
- At the University of Michigan Engineering School, which is one of the top ranked engineering schools in the United States, 60 percent of the undergraduate students in engineering are citizens of foreign countries. Ninety percent of the graduate students in engineering are from other countries. Today, 75 percent of those students repatriate, a reversal of the trend in the 1960s when 75 percent attempted to become American citizens. We've discussed this with the Michigan state government several times. We've suggested that what we're doing is training our competition for the next 20 to 30 years.
- And if you look at women in engineering, women as a percentage of students entering engineering rose throughout the 1970s but has declined ever since.

For a group like this, why am I bringing up these kinds of statistics? Let me illustrate by giving you one more on manufacturing:

- The manufacturing base of the United States has eroded significantly. In 1988, the Department of Defense sponsored a study of the United States' manufacturing base called *Bolstering Defense Industrial Competitiveness.* The study predicted that within 10 years, the United States would lack the basic productive infrastructure in all the core industries: metal processing, machining, machine tool building, semi-conductors, and composites.

Now the Department of Defense probably has more money and training programs directly associated with enhancing manufacturing in the United States than the Department of Labor's Bureau of Apprenticeship Training has at present. The Defense Department is so scared that in ten years it won't be able to produce a defensive system in the United States, that it is starting to talk seriously about building teaching factories all over the United States to try to increase the skills base.

Workforce Training Programs at Focus: HOPE

At Focus: HOPE, we're currently operating three training programs that we hope will help address the skills shortage in the manufacturing industry.

Basic Skills Program

One program is for people who graduated from high school but function at the 8th grade level in mathematics and reading. The course is a six-week, intensive, computer-interactive program, eight hours a day. In mathematics, we can increase people's skills by 2-1/2 years in six weeks. In reading, we can increase people's skills between six months and a year within six weeks.

Another part of the program addresses technology awareness, because high school graduates today know very little about the manufacturing industry in the United States. We also teach communications skills for those students who will find jobs in fields other than manufacturing.

Machinist Training Institute

The second training program is called the Machinist Training Institute. The Machinist Training Institute offers a rigorous 8-1/2 month program for 40 hours a week. Half of the instruction is classroom-based and covers math, shop theory, communications skills, computer literacy, statistical process control, blueprint reading, Computer Aided Design (CAD), and drafting. The other half of the program takes place on the shop floor where trainees learn their trade from skilled instructors.

Typically, we train people who are just out of high school or people who have been unemployed for three years or more. At the end of the 8-1/2 months, we place 97 percent of our graduates in jobs in the manufacturing industry.

Center for Advanced Technology

At Focus: HOPE, we're currently developing the Center for Advanced Technology, which will offer a six-year training program. We are hoping to develop it into an applied engineering degree program in which a student starts as an apprentice machinist, and with the experience of the Center for Advanced Technology behind him, goes on to become an engineer.

A Role for Retired Machinists at Focus: HOPE

How can retired people offer some assistance in these programs? It's quite simple. Their skills and experience make them ideal members of our teaching staff.

In a trade like skilled machinists, or tool and die, or any of the metal working fields, most workers were trained during the period from World War II through the Korean Conflict. They're primarily white males because of the history of the period. After the Korean Conflict, there was a surplus of these workers, and the entire industry guilded. By guilding, they protected their economic status, and at that time, they didn't foresee the need to replace themselves. Thus, the mean age of metal workers in the United States is 58, and they're retiring at a rate ten times greater than any current educational system can possibly replace them. (All of the institutions that offered training for these types of skills have closed within the last 30 to 40 years. Henry Ford Trade School, a well-known school in Dearborn, Michigan, went out of business in 1952 at the end of the Korean Conflict.)

> ***"Most of them have been quite successful in their careers and are more than willing to share their expertise with young trainees who will eventually carry on the field."***

In the Machinist Training Institute, over half the faculty are retired people. If I go down on the shop floor, between 60 and 75 percent of my faculty are retired people. Nowadays, it would be difficult to find these skills anywhere, much less pay for them. In a human service institution like this, we can't afford to pay $75,000 to $80,000 a year for instructors, which is what a skilled craftsman is earning now. Instead, we call on retired machinists to be our faculty. Most of them don't want to earn more than a certain amount per year because of Social Security regulations, and they tell us what they'd like to earn when they come in. Most of them have been quite successful in their careers and are more than willing to share their expertise with young trainees who will eventually carry on the field.

One of the things that really motivates these retired folks to come back and teach is that there are interested young people out there who want to learn the skills that they have developed over a lifetime. And, retired machinist faculty members will continue to be a vital part of Focus: HOPE's programs as the Center for Advanced Technology evolves.

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ALTERNATIVE CERTIFICATION FOR OLDER TEACHERS

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Today, I'm going to talk about bringing older people into the elementary and secondary teaching profession. As you have undoubtedly heard, the United States is supposed to be facing a dire shortage of teachers. Many people believe that encouraging older people to enter the teaching profession might alleviate this projected shortage.

A Projected Shortage of Teachers

The teacher shortage was based on a set of assumptions by the U.S. Department of Education's National Center for Education Statistics (NCES) that overlooked the possibility that there were older people who might be available and willing to teach (U.S. Department of Education, 1983). In fact, the teacher shortage is *not* developing. Many more people are applying for teaching jobs today than there are positions to fill. So the teacher shortage is a myth.

I think it's important to know *why* the teacher shortage is not developing, because we still hear quite a lot about it. The original assumptions on which it was based are quite simple. The projections were made in the early 1980s, following 15 years of steady elementary and secondary school enrollment decline. During that time period, the number of younger people dropped significantly, and enrollments in kindergarten through 12th grade fell 15 percent. Therefore, when the projections were made, the first assumption was that enrollments in elementary schools would go up (U.S. Department of Education, 1983). They have risen slightly from the early 1980s, but only by about four percentage points. Demographers expect that they will start falling again in the mid-1990s. What we've seen in terms of enrollment increase is just a "blip" in the overall trend.

Another of NCES's assumptions was that the attrition rate for teachers would be about 6 percent, due primarily to retirements (U.S. Department of Education, 1983). What has actually happened since 1980 is that teachers *aren't* leaving the profession. The National Center for Education Statistics' data show that the attrition rate is closer to 4.1 percent—not 6 percent—and that the retirement rate for teachers is actually below 2 percent a year. Many states allow teachers to retire with full benefits at age 55, and they're not doing it. One of the reasons for this is that no professional occupation has experienced more gains in salary than teachers have over the past decade. The incentive to remain in the workforce today is considerably greater than it was in earlier decades.

The third assumption affects older people in the larger market for teaching. It states that if no additional students chose teaching careers beyond those who were already studying to be teachers in 1983 (when the projections were made), then by 1992 the supply of new teacher graduates—not the supply of teachers—would be only two-thirds of demand (U.S. Department of Education, 1983). We've heard nothing but dire predictions of teacher shortages since.

An Aging Society

Turning now to some population projections, in 1970 about 62 million people in this country were over the age of 45. There were 20 million people age 65 and older. Today, those numbers have risen to about 79 million age 45 and over and about 32 million age 65 and over. As you are well aware, the baby boomers will contribute to this trend for several more decades. By 2010, it is projected that about 120 million Americans will be over age 45. This is very significant when you examine workforce demands in this country.

The Bureau of Labor Statistics, in its *Projections 2000*, stressed that this aging of the population does not mean we will have a shortage of workers. It stated very clearly that instead there will be a shift to an older workforce (U.S. Department of Labor, 1988). But people tend to focus on the cohort of 16- to 19-year-olds as if they are the only new workers in the future. As we approach the turn of the century and beyond, people will be living longer, staying healthy longer, working longer, and will be more enthusiastic about staying in the workforce. I think these older Americans will contribute greatly to the future workforce, and to the teaching profession in particular.

Alternative Teacher Certification

The Department of Education admits that it overlooked the growing population of older adults with college degrees who are available and willing to teach. The challenge for the educational system today is how to equip these older teachers with the skills and courses they need to become full-fledged, certified instructors.

I have always supported alternative routes for certifying teachers. In most cases, these alternative routes allow a person who already has a bachelor's degree to start teaching under the tutelage of a mentor while taking education courses. This means that the prospective teacher does not have to give up income, which frequently happens if one goes back to college full-time. I have argued that these alternative certification programs would attract older people.

Who's Being Hired

There's a lot of evidence that people age 50 and over are very interested in teaching. They're even interested in going back to college and becoming certified to teach. But statistics show that they are *not* the people being hired. In fact, about half the people who are being hired to teach today are returning teachers. The National Center for Education Information (NCEI) completed a national survey of teachers in the spring of 1990 that showed that 45 percent of new hires in the teaching profession in the last five years were actually returning teachers. The other 55 percent of new teacher hires was primarily made up of recent college graduates majoring in education (Feistritzer, 1990). So, in the absence of a dire shortage of teachers, the system isn't working very well for older people.

> ***"There's a lot of evidence that people age 50 and over are very interested in teaching . . . But statistics show that they are not the people being hired."***

I suspect that for many years the education bureaucracy, in order to cut costs, has been hiring young and cheap. Its first option is to hire young people straight out of college; that seems to be the first crowd hired. School districts also favor returning teachers over mid-career changers or early retirees. I find this phenomenon pretty discouraging. There's probably no one debating this issue that wishes there were a teacher shortage more than I do, because I think that if there were a real crisis, the system would be forced to conduct its affairs differently than it has chosen to do for many years.

Older People as Teachers

Older people with life experience—whether it be a career, raising a family, or whatever—would be a tremendous asset to our educational system. I think that the student population today needs the stability that life-experienced people can bring to the educational setting. And, when coupled with the eagerness many older people are showing in improving our educational system and in working with young people, I can think of nothing that would improve America's educational system more than adding some life-experienced teachers to the teaching force. We need to draw in older people who are enthusiastic, eager, and concerned about trends in education today, trends which do not bode well for America's future.

Unfortunately, I am pessimistic about the prospect of this coming to pass. Licensing is an absolute prerogative for teaching in public schools in this country. Getting a teaching job today can be very discouraging for older people. Not only do you have to meet the licensing requirements, which in and of themselves are not that bad, but you also must possess the stick-to-it-iveness that's required to get a teaching job today.

To date, the life experience contribution older people can make in education has largely been ignored. I don't know why older people have been relegated to doing only volunteer work. Why can't energetic, enthusiastic, knowledgeable, concerned older people be given the same consideration as recent college graduates who have a catalogue of new education courses under their belts? Many older persons would be willing to take those courses if they could get teaching jobs.

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PROFESSORS IN RETIREMENT: ARE WE MISSING AN IMPORTANT SOCIAL RESOURCE?

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The good news is that retired professors are living longer, are in good health, and are financially better off than ever before. The downside of this good fortune is that many have lost their identity, flounder in a sea of ennui, and have talents that are going to waste. And society is missing the benefits of rich experience and knowledge while bemoaning the dearth of trained technical and administrative personnel.

Retired Professors: A Status Report

Some professors retire willingly, even eagerly. Others slip out of their academic togas reluctantly and sadly. But after they achieve emeritus status, most continue to live on the periphery of their former place of employment, the university, like a criminal drawn to the scene of his crime. Healthy, active, and financially secure, they own their own homes, seek a warm climate in winter, or do a bit of travelling, and once or twice a year visit their children and grandchildren in some distant city.

Some live in condominiums, clip coupons or buy bonds, and keep some tie to their old university—use of an office, a library card, a parking sticker—and perhaps once a week or so lunch with a few old cronies at the faculty club (Bull and Lane, 1982).

Some write books or teach part-time. A few are volunteers in local hospitals or organizations. Some still teach and do research. Others start businesses or do consulting work. But the significant professional ties to the university administration and faculty have been severed: retired professors have been put out to pasture to make way for a younger, more up-to-date generation of scholars. In all but title and the superficial amenities of academic deference, retired professors are considered, even by the community of educators, to be of little consequence, and perhaps by some, even a drag on their curricular hegemony.

They are generally not sought after as participants or contributors by other educators or even by former colleagues in their own disciplines. True, they are glad-handed and complimented on their good health and appearance when they occasionally visit. They are often invited to meetings and staff parties, but their advice is rarely sought, and they are regarded as outsiders by younger faculty, many of whom don't even know their names. I believe it is a fact that most universities have underestimated the feelings and the potential and willingness of retired faculty to stay involved and productive.

Research on Retired Professors' Activities

There has been little research published about retired professors. Some studies have focused on their volunteer, nonuniversity related teaching or research. Others have attempted to ascertain what they do in their spare time, or if they work. A research project conducted at Southern Illinois University (SIU) elicited information that closely parallels the findings of a national survey conducted in October, 1982, by the Teachers Insurance and Annuity Association (TIAA). Briefly summarized, the conclusions are (TIAA, 1983, 1, 4):

Average retirement age	65
State of health (good or better)	90%
Remained in the community	60%

In addition, the TIAA study reported that the average annual household income of former faculty in 1981 was $33,500, and that most had income from investments, part-time jobs, and other pensions, in addition to their university retirement benefits (TIAA, 1983). The SIU survey reported that retirees received 51 percent of their income from a state pension, 11 percent from Social Security, 20 percent from investments, 8 percent from other pensions, and only 6 percent from employment or business income (Auerbach, 1990).

In both surveys, emeriti faculty indicated they were generally satisfied with their lives, some claiming they "are busier now than when they were working full-time at the university" (Auerbach, 1990). But significantly, the TIAA study lists the "activities retired participants pursue" as follows (TIAA, 1983, 5):

Reading	92%
Socializing with friends	75%
Gardening/Home improvements	71%
Travel	66%
Hobbies	61%
Writing/Painting/ Other creative pursuits	44%
Religious or church activities	36%
Community service	35%
Sports/Physical fitness	34%
Professional or job-related organizations	32%
Civic and fraternal groups	30%
Educational programs	28%
Retirees' clubs	24%

In neither study was there any evidence of significant professional involvement or continued interest in the university where they may have been employed for as long as 40 years. In a few cases, retired professors actually expressed negative or hostile feelings about real or imagined injustices incurred during or after their term of employment. It appears that a good deal of talent and experience which could be tapped is being lost.

An International Perspective

Lest we in the United States think that better use of retired faculty is being made by institutions of higher learning in other western nations, here is a brief summary of a survey of 10 European nations' policies on retired university faculty (Klasek, 1983):

Belgium. Mandatory retirement age is 65, but faculty may return for two more years and keep their offices for research. Retired faculty are used for student counseling and for working with foreign visiting professors.

Denmark. Professors may retire voluntarily at age 60; mandatory retirement age is 70. Retired professors are not allowed to work at the university once they have left.

England. Normal retirement is between ages 65 and 70, although some professors may retire as early as age 50. Some privileges are extended to retired faculty, but they are not involved in decision-making, governance, or direction of any kind.

Finland. Professors are civil servants and must retire at age 64. They may apply for additional years of active status and may keep their offices at the university, but cannot have graduate assistants. As "docents," they may teach two hours a week at a "symbolic" salary.

France. Mandatory retirement age is 65. "When a faculty member is out, he is out." Doctors and lawyers may continue in private practice.

Germany. Mandatory retirement is at age 65. Early retirement is possible at age 55. Emeriti may be assisted by doctoral students for up to three years after retirement. Retired professors are often used by the university for public relations and fundraising.

Ireland. Mandatory retirement age is 70, with pressure on faculty for earlier retirement.

Sweden. Faculty are civil servants who retire at age 65 or 66. They can keep an office and be hired part-time. Emeriti professors may continue research and consult for industry.

Switzerland. Professors retire between ages 65 and 70. There are no plans for their use at the university after retirement, except for "gaps or special needs."

All of this is not to say that emeriti professors are unhappy in their retirement. A recent inquiry by the American Association of University Professors of 151 fifty-year members determined that overwhelmingly most said they were satisfied with their churches, social groups, and overseas travel (Retirement Reflections, 1983). Some write textbooks, even novels, but others spend time gardening, walking along the seashore and in wooded areas, and sitting and thinking (4). The general advice given to pre-retirees is: "Don't retire to golf, bridge, and loafing." Retirees warn "against cutting oneself off from professional ties and from the young and against letting the intellectual fires die"(4).

Emeriti Versus Faculty

We are all aware that older persons face prejudice in employment and promotions. It may come as no surprise that older faculty are also faced with discrimination in our institutions of higher learning. When the mandatory retirement age was eliminated for most jobs by the U.S. Congress in 1986, one occupational category exempt from the legislation was "tenured professors" who could still be made to retire at age 70 (U.S. Congress, 1991). And it's common practice for university administrations to encourage "early retirement"—sometimes by firm and gentle shoving, sometimes by bribery—by pointing out the financial advantages of a retirement pension and a part-time teaching assignment at a lower salary.

> ***"In our universities there should be greater emphasis on an intergenerational partnership, with greater involvement by young and old in research, teaching, and service."***

True, some older faculty members *should* be retired—some of them years before reaching retirement age. And for a university desperate to balance the budget, it's economical to replace a high-priced full professor with a nontenured assistant who may be assigned to a heavier and less glamorous workload at lesser expense. And, one cannot deny that there is a need to open up teaching and research opportunities for younger faculty who often bring to a university new ideas, an eager and fresh outlook, and a vigorous, dynamic stimulus. This contradiction often creates a generational conflict in the university community, just as it does in business and industry.

The conflict between some older professors resisting mandatory retirement and the impatient yearnings of younger faculty to get into the field and climb the ladder of academic achievement is real. And it reflects an aspect of change and growth that women and minorities have experienced in their efforts to achieve parity in our economic and educational institutions. The conflict and prejudice engendered by competition and insecurity is the price we pay for living in a competitive society that sometimes overemphasizes the interests of individuals and special groups. And higher education is not immune to this tendency.

I do not mean to disparage the impressive contributions that younger faculty have made to the accumulation of knowledge and to the support, comfort, and well-being of the elderly. I am merely suggesting that in our universities there should be greater emphasis on an intergenerational partnership, with greater involvement by young *and* old in research, teaching, and service.

There is no more suitable laboratory for that kind of integrated exercise than a university setting where the knowledge, equipment, and commitment are present in the persons of the emeriti faculty. I submit that the effectiveness of intergenerational activities in higher education will be substantially enhanced by the existence of an organized, recognized, and active emeritus center or college as a part of the university community. Gerontological education can benefit by intergenerational as well as interdisciplinary involvements.

The Emeritus College

An Introduction

Institutions of higher learning can meet the challenge of encouraging collaboration among retired emeriti *and* younger faculty in a manner that can benefit all—the retirees, the working faculty, the students, and the administration. I suggest that a college or center of emeriti faculty, recognized and accepted as an official entity of the university, can serve as a vehicle to mobilize and encourage retirees to continue their service to the institution and the community; can assist the working faculty in auxiliary activities such as tutoring, lecturing, organizing colloquia, or developing special projects; and can aid the administration in fundraising, alumni activities, outreach services, and community relations. For many campus activities, an emeritus presence injects a multigenerational atmosphere that can help ease the pressure between student and teacher, faculty and administration, university and community. It can help make campus relationships the prototype of an extended family by adding the presence of a grandparental generation.

Currently, few organized groups of retired faculty are actively involved in campus life. Those that do exist are mostly unofficial and haphazard "emeritus centers" or "faculty social clubs" with vague objectives and invisible support. Their members are involved in a variety of social activities—pot-luck dinners, classes, lectures, and picnics. Some *do* encourage volunteer activities for social agencies, or the development of part-time jobs in the community, or the projection of retirement pensions and perquisites. But, they are usually individual and inner-directed, with no systemic relationship to the university or community.

The Emeritus College at Southern Illinois University

An emeritus center or college, supported by a progressive administration and a sympathetic faculty, can corral and direct the energies, skills, and experience of retired faculty into a multitude of voluntary services to the benefit of students, faculty, administration, and community agencies. At Southern Illinois University, an Emeritus College organized eight years ago has been, or is now involved in, the following activities:

- A monthly slide show and travelogue at local public libraries presented by retired faculty and open to the public.
- Campaigns for blood donations for the American Red Cross blood bank.
- A fund drive among retirees that established a scholarship fund for undergraduate students (more than $20,000 raised).
- A tutorial and mentoring service for students, many of minority background, mainly in math, psychology, and the sciences.
- A series of pre-retirement seminars for university staff and faculty, and employees of business and industry in the community.
- A project to improve the relationship between migrant workers and townspeople in some rural areas.
- Recruitment of students by reviewing curricula and addressing student groups at high schools and community colleges.

- Research and feasibility studies in cooperation with university and community projects.
- Surveys to determine the housing needs of retirees.
- Aid to small businesses in financial management and public relations techniques.

None of these projects duplicates, overlaps, or in any way displaces the teaching, research, or advisory activities of the regular faculty. They are complementary, aimed at expanding and enriching the university's capabilities. In fact, deans, faculty, and advisors have requested emeritus involvement because of the retirees' skills and experience—and because their services are free (Auerbach, 1986).

Benefits of an Emeritus College

As gerontologists, we know that with financial insecurity removed, and given reasonably good health, the vital needs of retirees are acceptance and recognition and the opportunity to exercise their skills, intellect, and social commitments for positive outcomes. An organized vehicle such as an emeritus college can recruit and direct the talents of retirees to needed projects and fuel their ego-needs with suitable gestures of recognition.

An emeritus college not only benefits the retirees, but it also gives significant support to the educational process by enhancing the on-campus visibility of a generation many have thought of as being "over the hill." For the student and faculty in gerontology there is an added opportunity for a different kind of field practice, and an additional resource for gerontological research and innovative experimentation. If the university has a Gerontology Institute, or some interdisciplinary council dealing with aging, the presence of a retired faculty representative may be a welcome addition. Emeritus representation on the Faculty Senate or Graduate Council would support the involvement of retired faculty in campus life and enhance the visibility and understanding of the aging potential for all segments of the university.

"An emeritus college . . . can corral and direct the energies, skills, and experience of retired faculty into a multitude of voluntary services to the benefit of students, faculty, administration, and community agencies."

Cost Effectiveness

In terms of financial rewards, an emeritus college may be the most cost-effective service a university can render. The involvement of emeriti is voluntary, and support services such as secretarial or student work, telephone calling, and mailing can usually be extracted, with very little sacrifice, from an underworked or over-budgeted administrative or academic department. A retired professor with some experience in social work, psychology, rehabilitation, or health education and an interest in organizing such a project can be appointed on a part-time basis at a relatively modest salary.

Barriers to Creating an Emeritus College

An emeritus college, however, is not for everyone. Most retired faculty are not suffering for the lack of things to do and many can find their own satisfactions in artistic, intellectual, recreational, or volunteer activities available in almost every university community. Nor is such an elder college suitable for all institutions of higher education. In large cities, there are so many institutional opportunities and work possibilities that perhaps such a center seems irrelevant. And colleges in small towns or rural areas may find too few retired faculty residing in their vicinity to make a formal emeritus organization practical.

Furthermore, in the political atmosphere that exists on some campuses, creating any administrative entity is not always greeted with enthusiasm. Theoretically, an organization of emeriti professors would seem to be the least threatening addition of all. There is no turf to protect, and neither salary nor tenure is at risk. Still, doubt and opposition are potentially present, and skepticism and suspicion on the part of administrators, working faculty, and some retired professors themselves may be anticipated. To working faculty and the administration, an emeritus organization on campus may indicate a desire to "hold on," not to let go and allow leadership to pass to a younger generation of scholars. To retirees themselves the image may conjure up another bureaucratic institution like the one from which they only recently escaped. Some emeriti may indeed see an emeritus college as a threat to the independent scholarship of creative academics who reject any affiliations.

Opposition Unfounded

It is not the intention of emeriti to inhibit independent scholarship or social, economic, or recreational activities. Affiliation and involvement must be entirely voluntary and can be sustained only through the satisfaction derived from getting and giving in a free and receptive environment. With support for emeritus involvement from the administration, the faculty, and students, the chances of a successful experience and a beneficial impact are good. Indeed, the organization of an emeritus college should be sponsored by the faculty, which may find it a vehicle for interpreting and supporting their educational programs. What I'm suggesting may alter the configuration of the university family, but I believe a change in this direction would be for the better for the retired faculty, the university, the community, and society in general.

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AGENDA FOR THE FUTURE

SELF-DIRECTED LEARNING FOR OLDER ADULTS

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Older Adults as Learners

Research

Most people attending this conference are aware of the growth in numbers of older people participating in learning activities. Coinciding with this growth has been an explosion of research on older adults as learners, or as participants in programs like Elderhostel, various community college efforts, and others. The research has covered a broad range of topics. It has focused on the physiological problems adults face as they age, such as visual or hearing losses. It has examined other areas as well, including participation barriers, how information is processed, short- and long-term memory, intelligence measures, motivation, and life stages. Still other areas of interest have included cognitive or learning style development, the learning needs and activities of older learners, and life satisfaction.

It is clear that individual differences among older people *do* exist. Older adults simply cannot be treated as a single group. They should be viewed as heterogeneous, varied, and multi-dimensional in terms of needs and abilities. Although some researchers still stereotype older people with regard to learning ability, several believe that some seventy-year-old students can do as well as or better than younger learners if various obstacles can be overcome. Thus, a colleague and I have developed a set of instructional procedures for adults of all ages. The procedures build on the notion of heterogeneous abilities. We base them on the self-directed learning potential possessed by each person and refer to this as "individualizing the instructional process" (Hiemstra and Sisco, 1990).

Barriers to Learning

Older learners face a number of obstacles, regardless of the instructional process being employed. Although there will be some problems specific to a location or economic group, some of the common obstacles include: lack of transportation, lack of time, prohibitive costs, lack of confidence, negative stereotypes regarding education, and lack of knowledge about specific educational opportunities. A variety of health-related factors and a person's overall health status can also affect learning ability and activity. Fatigue, personal perceptions about declining health, and declining hearing or visual abilities are some of these barriers.

Knowledge about the various obstacles to learning has resulted in a whole host of ideas about instructional needs. Let me give you just a couple of instructional requirements to demonstrate how I believe such obstacles should be approached in an agenda for the future of lifelong education.

Such conditions or changes can create numerous problems that must be considered by instructors. For example, self-concept and self-confidence often decline when a person begins to experience physiological losses or when learning successes are few. Thus, it is important for facilitators to find ways of enhancing self-concept, self-confidence, and an ability to become self-directed. An instructor using an individualized instructional process employs various methods or approaches, such as removing competition or time barriers, that minimize the possibility of making errors or of entering perceived high-risk situations.

Speed of recall and corresponding fears about making errors can also affect the instructional process. Several steps can be taken by the instructor to address speed problems. For example, the time allowed for assessment instruments or for responses to questions can be made flexible, or individualized, and attention can be paid to how various learning activities are paced. I also believe that facilitating self-paced learning, whenever possible, is important.

The facilitator's role is important both in terms of the speed of presenting information and in expectations for a learner's response. If a facilitator allows for adequate response time, or removes traditional testing and evaluation methods, researchers have found that older learners normally will perform about as well as younger people. Recognition rather than recall techniques, frequent feedback on learner progress, and self- or peer-evaluation techniques are some positive evaluation procedures for older learners. Appendix A summarizes a number of instructional applications recommended for addressing a variety of obstacles to learning.

Condition	Change Pattern	Instructional Requirement
Color intensity: strength or sharpness of color	Losses begin to occur from about age 45 on	Don't depend on color coding; use sharply contrasting colors
Depth perception: ability to judge distances	Declines begin as early as the late 30s	Be alert for adults who sit near the front of the room

Activating the Educative Community

Let's turn now to look at some of the resources related to learning and participation in educational programs that may be available in the future. I have long believed in and advocated for making greater use of existing community resources for educational purposes. This notion is called "activating the educative community" (Hiemstra, 1985). The concept of activating the educative community assumes that most people and agencies in a community have a potential, if not actual, capacity for being involved in the educational process. In other words, the community can be the teacher of all who reside there. In a truly educative community, all individuals will accept the education of community residents as a task requiring everyone's time and energy. Education then becomes distinguishable and different from formal schooling.

> ***"Activating the educative community assumes that most people and agencies in a community have a potential capacity for being involved in the educational process. The community can be the teacher of all who reside there."***

There have been many examples in the past of educative communities working quite successfully. For example, several of my colleagues at Syracuse University have been engaged in a program to train retired people to use computers for various purposes. Once trained, the older people then use computers for their own needs, such as word processing, money management, and electronic communication with each other (many are active members of SeniorNet). More importantly, in terms of the educative community concept, they volunteer in the Syracuse elementary schools and teach primary-age children how to use computers. I certainly hope that the future will see many more efforts to activate the educative community as a way of most effectively using limited financial resources while tapping into the vast personal skills and resources that exist in any community.

Future Policies Promoting Lifelong Education

Finally, I'd like to discuss some policy changes necessary in the future that will be important to older learners. Developing policies for older learners, interested educators, and educational or community institutions is a difficult and complicated activity. It requires considerable knowledge about the older adult as learner. It also requires a recognition of the complex nature of most societal problems and requires integration of knowledge, beliefs, and practice. The application of personal and institutional philosophies to the policy building process also can be a crucial component. Finally, incorporating policy recommendations into daily practice requires much care, dedication, and patience. When a policy statement or recommendation is made, it can be used in various ways—as an organizational directive, as societal rules or norms, for institutional procedures, as a bureaucratic necessity, and even for personal traditions.

For purposes of this discussion, the following definition is presented: policy—a recommended course of action for achieving some goal or for meeting some need. The key word in this definition is "recommended." I believe that policies should be used as a framework for decision-making, not as rules or directives. In other words, the purpose of a policy is to provide for the integration of institutional or personal philosophies with such elements as needs, objectives, and available resources. This integration can provide for operational guidelines at both individual and organizational levels, especially as we search for new ways of encouraging mid-life and older people to participate in educational programs.

Writing policies requires clear, concise language that communicates easily to others. Policy statements should be comprehensive in demonstrating linkages to societal issues. If possible, they should have long- as well as short-term consequences. In addition, such statements usually need to address potential political ramifications, although there will be times when, to reflect an individual's philosophy, a policy will counter prevailing organizational or societal norms. Priorities are another consideration because certain policies may need to take precedence over others. Finally, a policy must be examined in light of available resources if it is realistically going to be implemented.

I have conducted several workshops on how to stimulate more individualized and self-directed involvement by adults in learning (Brockett and Hiemstra, 1991). One of these workshops dealt with the derivation of several policy statements. The result produced three areas of policy statements for self-directed, lifelong learning. I have further refined and categorized these statements through a study of policy needs and interviews with older adult learners, educators of adults, and agency administrators. I share them with you in the hope they can be used as guides or recommended courses of action as you reflect on this conference and think about future policy needs for lifelong education programs. Here are several illustrations:

Policy Area	**Policy Recommendation**	**Implementation Strategies**
Older adults as learners	Each older learner should be acknowledged as having unlimited potential	Utilize small group discussion to assist older learners in discovering their own abilities
Adult education agencies	Agencies working with older learners need to provide physical environments that will accommodate learning	Examine the various physical environments in which learning takes place; make appropriate changes

Appendix B lists a variety of policy recommendations and implementation strategies. I look forward to discussing future options and some of the ideas I have shared today.

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APPENDIX A

Age-Related Changes: Implications for Instruction

Relating to the Needs and Experiences of Learners

- Base learning activities and instructional approaches on the needs and interests of the learners.
- Be flexible in terms of differing needs, interests, and abilities that may exist.
- Be sensitive to life stages and the impact of life changes on needs.
- Be sensitive to the value of social interactions among learners.
- Use small group discussion to help learners analyze personal and group needs.
- Encourage learners to work together in groups when feasible to meet certain needs.
- Help learners relate new knowledge to past experiences.
- Help learners understand the advantages and disadvantages of being an older person.
- If text material is utilized, help learners tie the information to their current knowledge base.
- Understand the cognitive styles of learners and develop instructional approaches for different styles.

Involving the Learner in the Instructional Process

- Facilitate the learner's active involvement in all aspects of the individualizing process.
- Facilitate self-directed learning, self-directed determination of learning goals, approaches, and resource needs, and enhance the development of a positive self-concept.
- Reduce learner dependency on the instructor and increase self-responsibility.
- Promote self-motivation and learning efficiency.
- Utilize discovery techniques.

The Personal Approach of the Facilitator

- Be positive, supportive, and helpful.
- Help older learners compensate for intellectual and non-cognitive changes.
- Help to promote learning confidence, self-discipline, and self-respect.
- Maintain an environment of informality and levity.
- Work to make learners feel welcome and at ease in any new learning setting.

Attention to the Pace of Learning

- Allow for long periods of time between stimuli, for responding to questions, and for group discussion.
- Allow more time for all aspects of the learning experience.
- Avoid sudden surprises or changes.
- Be sensitive to perceptions about life satisfaction and locus of control.

- Keep sessions short (perhaps 50-60 minutes), discussion time on any single subject short, and present small amounts of information at any one time.
- Keep the pressure of time at a minimum.
- Permit and promote individualized self-pacing by learners.
- Promote certainty, confidence, and success by moving from easy material to difficult subject matter (build on successes).

Evaluation and Assessment

- Be sensitive to quality of life and life satisfaction issues in relation to educational participation.
- Encourage the use of outside validators who may be the most knowledgeable about a topic area.
- Minimize the chance of failure and the impact of making errors.
- Provide regular feedback on progress, use peer review or feedback, use positive feedback techniques, and use various review strategies.
- Reduce or eliminate required homework and graded testing procedures.
- Use interview techniques, if feasible, to help learners talk about their learning, problems, and aspirations.
- Use multiple-choice testing when testing is required.
- Use recognition techniques as opposed to more traditional recall methods.

Organization and Meaningfulness in Learning Activities

- Be highly organized.
- Suggest instructional goals or objectives and help learners develop their own.
- Use prerequisites, outlines, study guides, and other advanced organizing techniques.
- Help learners increase confidence in personal learning ability.
- Help learners process information they receive.
- Help learners organize their learning activities.
- Facilitate the use of learning contracts.
- Encourage practicing techniques.
- Encourage learners to take notes or to make outlines.
- Encourage learners to use verbal coding.
- Make organizing the material part of the learning process.
- Stress tying together of concepts, relevance of information, and connections to learner's experience base rather than memorization.
- Utilize materials and information that will have real meaning to the learner.
- Use a highly stimulating approach that will appeal to several senses.
- Use concrete examples and base them on learner's past experiences when possible.
- Be sensitive to cognitive or learning style differences.

- Utilize various cuing devices.
- Encourage the learner to develop mediators or mnemonic devices (visual images, rhymes, acronyms, and self-designed coding schemes).
- Seek cues that are familiar or that can be tied to past knowledge.
- Use headings, summaries, and review aids.

Sensitivity to Barriers, Obstacles, and Physiological Needs

- Be sensitive to declining hearing and related problems for some older learners.
- Be prepared to help learners move closer to sound sources.
- Use extra voice and media amplification.
- Be sensitive to declining vision and related problems for some older learners.
- Allow adequate time for adjustments when going from a light to a dark area or vice versa, such as showing a film.
- Insure that lots of light is available.
- Reduce glare or direct sunlight.
- Use high contrast on visuals and handout materials; ensure proper illumination for visual aids.
- Use methods and techniques that emphasize visual as well as interactive and aural approaches; de-emphasize haptic, kinesthetic, or olfactory approaches.
- Be sensitive to memory losses and the corresponding impact on assimilating new information.
- Be sensitive to the manner of presentation.
- Read material aloud where possible or feasible.
- Use combined auditory and visual presentation modes.
- Carry out diagnostic evaluations of the learner's needs, abilities, and limitations.
- Minimize distractions during learning, including background noise and personal anxiety.
- Pay attention to the physical environment.
- Insure comfortable heating and proper ventilation of the facility.
- Take appropriate breaks.
- Assist those with limited mobility; help learners accommodate for declining energy or occasional depression.
- Don't depend on color coding as a reliable pattern or category discriminator.
- Be alert to accommodate those adults who need to sit near the front of the room.
- Ensure that all learners can focus on and see all visual aids or make accommodations.

Adapted from Hiemstra, R., and Sisco, B. (1990). *Individualizing Instruction: Making Learning Personal, Empowering, and Successful.* San Francisco: Jossey-Bass, Publishers.

APPENDIX B

Some Policy Recommendations and Implementation Strategies

Older Adults as Learners

Policy Recommendation: Each older adult learner should be acknowledged as having unlimited learning potential and given respect as a self-directed learner.

1. Utilize small discussion groups or create learning networks to assist older learners in discovering through trial and error their own gifts and talents.
2. Offer opportunities for older learners to focus on their own individual strengths.
3. Broaden the availability of educational resources that teach about personal potential, learning skills, and using learning materials.
4. Help individuals who teach adults to understand their role in promoting self-directed learning.

Policy Recommendation: Older learners should be encouraged to objectively examine their personal strengths and weaknesses as a means for gaining self-acceptance, capitalizing on individual assets, and setting goals.

1. Provide opportunities for such learners to carry out self inventories or complete self-concept measures.
2. Make available facilitators, learning consultants, or counselors who have skill in discussing self-inventory results as information for planning.

Policy Recommendation: Older learners should be helped to develop and strengthen internal reinforcement mechanisms to insure continuous growth in their learning efforts.

1. Provide access to and training in using a variety of reinforcement resources such as meditation techniques, personal journal or diary writing, and critical thinking techniques.
2. Train teachers and learning facilitators to help older learners strengthen personal growth skills.
3. Seek learning resources and techniques that help older learners with internal reinforcement.

Policy Recommendation: Older learners need to be helped to understand their own learning or cognitive style and to utilize such information in shaping their educational efforts.

1. Provide opportunities for learners to complete measures of learning and cognitive styles as an informational basis for future planning.
2. Train teachers, counselors, and learning facilitators to interpret and use information on styles in assisting learners with their planning.

Policy Recommendation: Older learners should be encouraged to form autonomous learning and support groups as a means of capitalizing on synergistic learning efforts.

1. Develop learner hotlines using such agencies as libraries, learning brokers, and universities to provide support or coordination.
2. Promote the concept of learner advocacy at adult learning centers and within adult education professional associations.
3. Establish learning exchange networks in local communities.
4. Establish study circles patterned after the Scandinavian system of both topical and open-topic groups.
5. Foster peer support groups or systems revolving around a variety of content areas.

Policy Recommendation: Older learners need to be supported and provided with opportunities to take individual responsibility for their own learning.

1. Provide appropriate administrative support necessary to foster individual adult initiative, such as convenient scheduling, adequate resources, transportation, and adult counseling programs.
2. Foster time management and good planning through related workshops or learning materials.

Educators of Older Adults

Policy Recommendation: Continuing research is needed to explore and understand various aspects related to self-direction in learning.

1. Examine learning techniques and skills necessary both for learners and facilitators.
2. Identify means for enhancing learners' problem-solving, resource utilization, and evaluation skills.
3. Explore the applicability of self-directed learning techniques to various subject-matter areas.
4. Identify those people who are reluctant to utilize self-directed approaches and determine if such approaches would be beneficial in their learning endeavors.
5. Study the relationship between developmental life stages and various self-direction approaches to determine their appropriateness to a person's stage in life.

Policy Recommendation: Educators of older adults need to receive training in utilizing theories and practices related to self-direction in learning.

1. Provide students in formal adult education training programs with an understanding of self-directed learning concepts and approaches.
2. Provide in-service training in self-directed learning approaches for the many teachers of adults who have not received any formal training related to the topic.

Adult Education Agencies

Policy Recommendation: Adult educators need to help agencies serving older adults to incorporate the concepts of self-directed learning into their normal operating procedures.

1. Promote the use of self-direction approaches through the development of individualized resources, creation of self-study materials, and establishment of appropriate learning settings or mechanisms.
2. Conduct needs assessments of learners to determine possibilities for self-directed learning and provide such information to agency administrators and other personnel.
3. Assist agencies in their utilization of self-directed learning approaches and help to coordinate the implementation of related resources and services.

Policy Recommendation: Agencies, organizations, and institutions working in some way with adult learners need to provide opportunities for administrators, faculty, and staff to become knowledgeable about self-directed approaches.

1. Instruct employees on the research and related literature pertaining to self-direction in learning.
2. Provide employees with workshops, in-service training, and resource material related to self-direction in learning.

Policy Recommendation: Agencies, organizations, and institutions working in some way with older adult learners need to develop and maintain various measures or criteria for accountability and evaluation so that the effectiveness and value of self-directed learning can be ascertained.

1. Develop reporting systems that will include collection and reporting mechanisms, such as learning contracts, mentoring or internship reports, and even credit for work experiences.
2. Experiment with new and innovative evaluation methods, such as interviewing, networking assessments, and validation through electronic means.

Policy Recommendation: Agencies, organizations, and institutions working with older adult learners need to seek legislation and funding to promote and facilitate self-direction in learning at local, state, and national levels.

1. Secure learning resources and other kinds of study opportunities, such as internship assignments, agency visitations, and sharing of library materials, from a multitude of community agencies.
2. Influence legislation by working with professional associations, contacting legislators, and seeking various kinds of public support for individualized learning efforts.

Policy Recommendation: Agencies, organizations, and institutions working with older adult learners need to provide support services that help those desiring to be self-directed as they adjust to various individualized activities and any related changes in self-concept or approaches to learning.

1. Establish centers or special locations within agency settings where such learners can gather, obtain necessary resources, and support each other.
2. Provide support personnel with appropriate expertise to counsel with and help older adults make effective use of their newly acquired skills and knowledge.

Policy Recommendation: Agencies, organizations, and institutions working with older adult learners need to provide physical environments that accommodate and facilitate individualized learning.

1. Examine the various physical environments in which learning takes place and make changes to enhance participation.
2. Provide an on-site specialist on physical learning environments who can work with facilitators and learners in designing appropriate physical conditions.

Adapted from Brockett, R.G., and Hiemstra, R. (1991). *Self-Direction in Adult Learning: Perspectives on Theory, Research, and Practice.* London, UK: Routledge.

BECOMING PART OF SOMETHING BIGGER THAN OURSELVES

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The Freedom to Choose Lifelong Education

The appeal of lifelong education grows from the modern belief that there are boundless horizons to reach for. Or, in a more practical sense, the world is driven to such rapid social change by scientific and technological discovery that individuals must learn continuously to stay abreast of the changes.

Lifelong education is also influenced by one important aspect of the industrialized world: for the first time in history, a society can satisfy its material needs and also give many of its older members an opportunity for leisure, without the need to continue working to support themselves. This chance for freedom—from what has been a traditional view of work—gives many people a choice about what to do with this released time. There are no social standards, no guidelines for choice. Instead each individual who has the gift of freedom from "work" is free to decide what to do with that released time. But that freedom is still constrained by social attitudes that exist about work and leisure.

In this new market of free choice, we already know, in very general terms, how mature people choose. Some relish playing, travel, or the stimulation of learning new things or acquiring new hobbies. These choices are often made in the context of broadening one's own experience. However, decisions about retirement pursuits are frequently made without consideration of what to do with that broadened outlook. These pursuits are basically self-centered. Some retirees find full realization of themselves in devotion to their family, to grandparenting, and to intensified intra-family relationships. Still others seek out new careers and go to work in them. And finally, others reach out to their larger community by volunteering their time and skills to social service organizations or government.

Unfortunately, the evidence about this latter choice is unsatisfactory. Existing data suggest that volunteering for most people involves an hour or two each week or month. For some, the work is transiently satisfying because of the social relationships it fosters, but it does not contribute significantly to the well-being of others.

The Value of Education to the Individual and Society

I want to introduce a rather different view of this relatively new life situation called retirement. I believe that the lives of individuals and their community or society are completely intertwined and interdependent. This social integration is necessary if a vibrant, healthy social and community environment is to flourish in which its individual members can also grow.

Our present views about learning in the later years are premised on a rather abstract belief that education benefits individuals and is good for society, too. But just how this optimal fit takes place is not clear. For some, the fit takes place through vocational training or learning. But others note that this is a very narrow view which does not include such aspects of education as the knowledge a responsible citizen must have in order to be a good citizen. It is also unclear just how a million citizens, each pursuing their private self-enrichment, will in turn create a fair society which will give everyone the leisure to pursue that inward-turning enhancement.

I would argue that most individuals feel some need to be part of something bigger than themselves. That "something" usually begins with the family. Education which improves the family through the individual has a clear social value. But our modern society is very complex; it is not based only on the family or the clan. Its success depends on a great network of formal organizations including churches, mutual interest or mutual aid associations, industries, businesses, and governmental agencies. Being part of something bigger than oneself means finding a way of being involved beyond the family in some of these other organizations.

What we need is more understanding, or learning, about how individuals and this outer social/economic network link up. We need to identify how older citizens can create a meaningful place in that network after they have completed their traditional career engagement. This is not to argue that everyone *must* be so engaged, but that we understand the importance and the potential of such involvement. Then, we can design our educational structures to this end, and create avenues for such engagement in our major social institutions.

Educating Retirees for New "Work" Roles

The tempo of social and technological change in modern society has become so rapid that as each of us enters the later years, we find that the skills our social institutions demand are often well beyond those skills we learned in our formative years and even in our careers. Computer literacy is the most popular example, but more basic changes in how organizations operate and the dynamics of human interactions have also occurred. As a result, those who have retired with many skills, as well as those with few formal skills, may need some updating or retraining if they are to be effectively engaged in social organizations.

It has also become necessary to re-evaluate the boundary between paid work and unpaid or volunteer work. New "work" roles in retirement are valuable, whether paid or unpaid. It is possible to think of volunteering as a new form of "work," especially if the "job" requires some skills, some commitment of time and interest, and responsibility for the performance of tasks valued by an organization or community.

In recent years, there has been slow growth in work-related or purposive training for older citizens. A few nonprofit vocational counseling agencies (such as Project ABLE in Boston) have concentrated on job placement for older citizens and, in the process, have stimulated job skills training for them.

A number of corporations have begun to employ older workers or offer to retain older employees. As unemployment rises in a recession economy, it is not clear whether such policies will continue. In a similar vein, several community colleges have tentatively experimented with expansion of their adult education programs to offer subjects older workers can use in their personal search for more meaningful activity.

An Academic Program in Aging and Human Services

The Program

One pioneering academic program at the University of Massachusetts in Boston has gone further, and its details may be informative. The Gerontology Program is about 10 years old and is sponsored by the university's Gerontology Institute. It offers a one-year course of study on the health and welfare systems in Massachusetts. Upon completion of the curriculum, graduates receive a certificate which enables them to work or volunteer in the aging and human service fields. The interesting aspect of this program is that it is designed for senior students aged 55 and over to prepare them for "work" in retirement.

Between 25 and 50 older students have enrolled in the Gerontology Program each year. Courses include an overview of the aging and human services systems; research methods, especially survey research; legislative and executive policymaking; and oral and written communication.

A major component of the program is a survey research project on a current policy issue. With faculty help, students choose a subject, identify the researchable questions, choose a focus, design survey instruments, and conduct the surveys. Students and faculty analyze the results and produce and disseminate a report on the findings. In a number of instances, the reports have influenced legislation and executive office decisions.

"It is possible to think of volunteering as a new form of 'work,' especially if the 'job' requires some skills, some commitment of time and interest."

Positive Outcomes

Upon completion of the certificate requirements, some students choose to enter advanced programs where they form task forces on persisting societal issues, such as the special needs of older women, health insurance, and housing, to name a few. Other graduates find paid jobs, either full- or part-time. A few choose to go on to acquire a bachelor's degree. Still others have joined study panels to work with major state agencies on specific issues. For example, in Cambridge, Massachusetts, one such panel worked, *pro bono*, with a retired urban planner to help the city of Cambridge and Massachusetts Institute of Technology develop plans for public and university use of a key plot of land. Another group worked in an advisory capacity with a major insurance company as it explored the possibilities of a long-term care insurance policy. For several years, a group of seniors worked with a former faculty member to operate a pre-retirement counselling and educational planning service for area employers. The companies contracted with the group to conduct retirement planning sessions with an emphasis on post-retirement careers.

Implications and Next Steps

The program has succeeded in attracting many interested older students and giving them usable knowledge so that they can become involved in developing solutions to real problems in the human services. It has also revealed that much more must be done to establish productive relationships with employers—either of volunteers or of paid employees—in order to identify what kinds of significant tasks need to be done and what jobs have been difficult to fill with workers from the regular workforce. In addition, employers can help identify what kinds of retraining or education is required to equip senior citizens to fill these positions. Finally, program participants and employers must assess the level of senior citizen interest in additional learning and in the challenging work opportunities available.

These findings prompted the Institute to develop a plan for a series of demonstration projects in various parts of the country. These pilot projects are designed to identify ways that different community resources can be brought together in a more effective partnership: (1) an educational institution ready to embark on a new program to re-equip senior workers for specific tasks; (2) a group of employers ready to explore their unfilled labor needs and identify positions seniors can fill; (3) and older people themselves, to evaluate the scope of their potential interests.

> ***"The lives of individuals and their society are completely intertwined and interdependent. This social integration is necessary if a vibrant, healthy social and community environment is to flourish in which its individual members can also grow."***

We have found that community colleges, which have already made great strides in education for younger adults, are especially interested in developing this new kind of partnership. The employer interest is less well-defined, although some national firms (e.g., AT&T and Travellers) have instituted benefits programs that pay for courses their employees want to take. No national pattern can yet be defined, but it is evident that educational institutions need to explore local labor force needs with nearby employers.

In the evolution of this program, the contribution of volunteer effort, and the possible interest of voluntary service agencies, has not been fully explored. It is my view that while there is a great deal of volunteering through social service agencies, much of this work is of minor value to the employing agency. Volunteers (other than members of boards or committees) are often seen as useful for public relations, but more troublesome than helpful. It would be fruitful to determine whether volunteer agencies can expand their labor resources by organizing significant tasks which they can turn over to interested seniors with the requisite skills.

Finally, we have only begun to think about whether there are other socially important tasks and functions that older people can perform if they are prepared to take on the required responsibilities. A great deal of one-time, and sporadic, volunteering is already occurring. Activities like collecting food for the very poor, working to improve the environment, and mentoring children in faltering school systems are popular among retirees. But, there are numerous unmet social needs. There are also limits to what the voting public will authorize for public expenditure on social services.

We are entering exciting, uncharted territory in work and service. Can retired people complement the work of business, voluntary agencies, and government to improve the quality of life for *all* citizens? To create such a future will require further exploration of retirees' interest in serving their communities. It will require educational institutions to take the lead in providing more focused training in the social services and equipping older citizens with the skills they need in a fast-changing society. These are some of the practical aspects of an agenda for the future if the gifts of longer life and leisure are to be used to improve our communities and society.

MENTORING AND THE ROLES OF OLDER CITIZENS

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The Mentoring Revolution

I am going to discuss mentoring and how it is changing the roles of senior citizens in American society. I do extensive research on mentoring, have published a book called *The Mentor Connection* (Zey, 1984), and help corporations plan and implement formal mentor programs. Over time, I have come to realize that mentoring, both formal and informal, has broad implications for American society, for young and old, corporations and colleges, the arts and business.

First, let me define the term "mentor." A mentor is a person who oversees the development of another person. He or she may serve as a guide, coach, teacher, or advisor. Over your lifetime, many of you may have benefited from a mentor's help and guidance, or you may now serve as a mentor to someone younger or less experienced than yourself.

It is slowly dawning on policymakers and political and business leaders that as people grow older, their accumulated wisdom makes them quite valuable to their institutions and to their less experienced colleagues. I like to think that the demographic reality of an aging America suggests that we now have a reservoir of mentors. And many organizations and communities are beginning to tap this reservoir in some unique ways.

Corporate Mentoring Programs

Corporations have been quick to realize that their older employees can serve as mentors for their younger staff members. And they also know that an employee can spend his or her entire career in an organization without ever connecting with a senior executive. Hence, the employee might never benefit from exposure to the manager's wisdom.

Enter the formal mentor program. A formal mentor program is very simple in concept: the company links a more experienced executive or senior manager with someone lower in the corporate hierarchy, perhaps even a novice. By last count, almost 10 percent of American corporations have instituted some type of formal mentor program. Organizations such as NCR, AT&T, Hoechst-Celanese, Dow Jones, the U.S. Postal Service, and Motorola now have such programs.

Why would such companies expend time and money to link senior and junior members of their organizations? There are several reasons corporations choose this course of action. They may want to increase communication among the various levels of the hierarchy. They may wish to ensure that certain knowledge is transmitted from one generation to the next. Or they may envision this type of program as a way for female and minority employees to be properly groomed for executive positions.

In the process of establishing formal mentor programs, companies are acknowledging that the seasoned executive, the older worker, possesses knowledge and skills that must be transmitted to younger workers. By incorporating the senior manager into the mentor program framework, the modern corporation is transforming the very definition of older executive, from administrator to teacher, guide, and seer.

> ***"As people grow older, their accumulated wisdom makes them quite valuable to their institutions and to their less experienced colleagues. The demographic reality of an aging America suggests that we now have a reservoir of mentors."***

Of course, companies themselves may be the ultimate beneficiaries of such programs. They are fully aware that potential recruits are more likely to join a company that offers immediate access to senior managers. And the employee who is invited into a formal mentor program will feel closer to the organization and is less likely to leave after only a short period of time. Furthermore, at a time when American society is confronting a long-term decline in the number of entry-level workers, demographics alone dictate that companies must find ways to attract and retain skilled workers. A formal mentor program is one way to surmount this problem.

Community Mentoring Program

Throughout the 1980s, mentoring has been used in a variety of areas outside the business environment. For example, mentoring has been used to combat the literacy problem. A program on the West Coast called HOSTS has integrated mentoring into its computer-based reading program. Older mentors are assigned to younger students to provide motivation, teaching, and guidance. Students are not just interacting with a computer screen; they are simultaneously taught to read by an understanding and patient friend. The results of this experiment are astounding: former "unteachable" students have become expert readers. The addition of a personal relationship to the teaching process has made the difference.

Communities throughout the country are turning to mentor programs to help ease the problems generated by the "latchkey child" syndrome. One of the great demographic trends in the United States is the increase of single-parent households. In many cases, the parent is female and employed. We now have a group of teenagers and pre-adolescents who spend much of their time at home alone and unsupervised. From the loneliness and ennui confronting these young people springs anomie and alienation, which too often lead to drug use and other deviant behavior.

Communities are beginning to realize that mentor programs can help alleviate this problem. They are linking older persons—often retirees—with "latchkey" youngsters and establishing a structure in which the older people serve as tutors, mentors, guides, coaches, and buddies to these youngsters for a few hours a day. The hope is that the mentors will have a positive impact on the young people's future.

New Roles for Older Americans

We have taken just a brief look at how formal mentoring is being applied to specific social and organizational problems. Before I close, I would like to address one last issue: the impact of mentoring programs on the mentors.

I believe that formal mentor programs will gradually redefine the societal role of older people. We will no longer regard such persons as "retirees," or as surplus dependents. Because such programs attribute value and worth to older people's accumulated wisdom and expertise, mentoring literally brings retirees back into the mainstream. Formal mentoring has inadvertently resuscitated the dormant concept of the "wise elder" which predominated in small-scale societies until the onset of the modern industrial era.

We must view the mentor role as educational for the mentor as well as the protégé. Mentors continually remark on the amount of information they have garnered from the person they are guiding, which implies that mentoring can serve as an educational process for the older person as well as the younger one.

I believe that we are only beginning to redefine the roles of older persons, and as the lifespan continues to expand, society will continue to discover new roles for its mature citizens.

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EDUCATION FOR AMERICA'S FUTURE

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A Crisis in Education

A crisis exists today in America's kindergarten through twelfth grade (K-12) educational system, and the situation is getting worse. Seventeen percent of high school graduates in this country cannot read above the fourth grade level and are labeled "illiterate." American students rank 49th in literacy when compared to students from 158 nations in the United Nations. The scores of U.S. college-bound students in biology, chemistry, physics, and several areas of mathematics are consistently in the lowest quartile of scores when compared to those of students in other major countries (Torney-Purta, 1990). American students also lag behind in their knowledge of geography, foreign languages, and political systems.

Twenty-nine percent of American high school students drop out of school before graduation. Twenty percent of those who *do* graduate do not possess the skills required to function in basic entry-level positions in today's workplace. Of the 36 percent of high school entrants who go on to college, approximately 42 percent graduate in six years. Many students who drop out after the first, second, or third year of college enter the workplace with questionable skills. Educators of K-12 students most often view their mission as developing college-bound students, yet only 15 percent of high school entrants complete college.

We, in American business, are increasingly concerned about the quality of our students' education. In a few years, today's students will join the American workforce, and further in the future they will be our nation's mid-life and older workers.

> ***"An 'education society' of the future, in which all citizens are involved in enriching, lifelong learning activities, will be difficult to attain if students today do not have the base from which to approach new endeavors."***

But the crisis in education is not the only challenge that faces American business. New technology is fast changing the workplace as well as the community and home. Keeping up with these changes will require constant learning and training by all citizens.

In addition, the challenge of global competition in the marketplace poses a serious threat to our nation's economic independence. The American workforce is rapidly losing its world-class status. If America becomes a third-ranked nation—behind Japan and Europe—as some people forecast, every individual in this country will lose. This crisis in American education and competitiveness threatens the freedom and success of us all.

Implications for the American Workforce

What will our nation's future be like if many of today's youth enter the workforce untrained and unemployable? An unqualified workforce will place a great strain on companies, government, and private agencies in the future. Companies will be forced to invest scarce resources (dollars and human capital) in basic training for their employees. If young workers were better prepared, these resources could be spent on career development education for all employees or in other needed areas.

The theme of this conference, resourceful *aging*, reminds us that it will be difficult for future generations to contribute their resources successfully to future society if they are constantly struggling to keep up. An "education society" of the future, in which all citizens are involved in enriching, lifelong learning activities, will be difficult to attain if students today do not have the base from which to approach new endeavors, both in the workplace and in the community.

Why talk about K-12 education at a conference on resourceful aging? First, we must remember that many of today's students and drop-outs will eventually become ill-prepared adults and older adults. The consequences for the workforce and for society in general could be severe both now and in the future. In relation to this conference's theme, I see older adults today as a valuable resource in addressing this serious problem and being partners in turning this trend around.

Motorola's Action Plan for a Better Future

Motorola is taking a leadership role in developing partnerships with business, education, and government to reverse this situation. These partnerships have resulted in activities such as teacher professional development programs, school enrichment programs, and special efforts to educate the public about the state of education in America.

A major Motorola initiative has been the development of a model of educational restructuring based on the corporation's own management and development experiences. This paper outlines the Motorola action plan for education that I believe will be effective and necessary in improving the global competitiveness of our economy. The recommended action steps require strong, continuous, and long-term support from all Motorolans (Motorola employees). I hope they will provide others with useful suggestions for confronting the education crisis in America.

Motorola's Definition of the Mission of the American Educational System

Highlighting the growing need for a qualified, educated workforce, Motorola has developed its own definition of the mission of the American K-12 school system. Motorola believes that it is essential to develop young people to their maximum potential in the following three areas:

1. **Social responsibility:** Our educational system must produce knowledgeable and responsible participants in the American democracy and the global society, with a broad-based knowledge of history, foreign cultures, geography, science, and mathematics.
2. **Employability:** Schools must work to promote student development of basic skills (reading, writing, speaking, and thinking in English; numeracy, problem-solving, and higher-order thinking skills); and habits, attitudes, and values that are required to be productive in the workplace.
3. **Lifelong learning:** The American educational system must help students develop the ability to learn about and adapt to the changes that will occur throughout their lives, after the completion of their initial formal education.

All individuals involved in the education and development of young people must focus on motivating and assisting *every student* to achieve this mission.

The Motorola Model of Restructuring

Let's briefly examine what is being done at the national level to address this crisis in education, and what Motorola proposes in order to ensure that the workforce of the future meets America's needs.

Motorola believes that the mission of education in the United States cannot be met without a major restructuring of the existing system. Motorola has developed the following Model of Restructuring which we hope will be a catalyst for changes in the educational system—changes that will contribute to a brighter future for America's students, and society in general.

Change Public Policy. In February 1990, the President of the United States and the 50 state governors established six major goals for education in this country. These goals are:

1. By the year 2000, all children in America will start school ready to learn.
2. By the year 2000, we will increase the percentage of students graduating from high school to at least 90 percent.
3. By the year 2000, American students will leave grades four, eight, and 12 having demonstrated competency over challenging subject matter, including English, mathematics, science, history, and geography.
4. By the year 2000, American students will be first in the world in science and mathematics achievement.
5. By the year 2000, every adult American will be literate and possess the know-

ledge and skills necessary to compete in a global economy and exercise the rights and responsibilities of citizenship.

6. By the year 2000, every school in America will be free of drugs and violence, and will offer a disciplined environment conducive to learning (The White House, 1990).

Motorola strongly supports these goals. Achieving them will be very difficult and will require the collaborative efforts of industry, government, and education, and strong input from the suppliers to the education system: parents.

> ***"Principals must create environments that empower and inspire teachers. They must be considered 'leaders of leaders,' and teachers must become leaders in their own classrooms."***

Change the Measurement System in Education. Reform in the educational system can be promoted by changing the factors that are measured. For example, improvements in quality and time factors at Motorola over the past few years have occurred because the measurement system was restructured to focus on Motorola's five key initiatives. The chief executive officer and others in positions of leadership hold every Motorolan accountable for achieving these goals as measured against the key initiatives.

Similarly, federal, state, and school district leadership must establish a new measurement system for education to respond to the changing demands of today's society and workplace. The new measurement system must set high expectations for both students and education providers. The measurement process must be criterion-based (what the student actually knows and can do) rather than norm-based (what the student knows in relation to others, or the curve-based grading system). The measurement system must also focus on learning outcomes (higher-order thinking skills, problem-solving, and integration of knowledge) rather than recall or recognition outcomes (memorization of facts that become outdated or incorrect over time or that can be easily retrieved when necessary from books or computers).

We recommend that policymakers and educational leaders work to establish this new measurement system that focuses on the important types of skills necessary for success in our changing world. School boards, principals, teachers, and students must be accountable for working to reach higher levels of achievement in these important areas, while focusing on the three elements of the education mission—social responsibility, employability, and lifelong learning. Perhaps then we can all work together to achieve our national education goals by the year 2000.

Elements of Change in the Educational System

Facilitators and Implementers of Change. Those persons responsible for facilitating and implementing change in education to meet the mission and goals must begin to view themselves as "change agents." It is interesting to note that these potential agents of reform, the superintendents and principals, usually refer to themselves as "administrators" rather than as "leaders" or "managers." At Motorola, managers are expected to be leaders in creative improvement. These same expectations must be set for the leaders in education.

School superintendents and principals must also develop high expectations for their teachers and students. Principals must create environments that empower and inspire teachers. They must be considered "leaders of leaders," and teachers must become leaders in their own classrooms. To do this, principals and superintendents must become more skillful team leaders and must receive appropriate training to develop the skills necessary to motivate their staff and promote a productive learning environment.

Teachers also need training to become "leaders of learning" in their classrooms. The curricula in many teacher education programs must be improved to include such training, as well as instruction on facilitating team learning. In addition, teachers must have the support of parents. Parents are the first and most important teachers of their children. They need to be educated about what takes place in the learning environment today, much of which is different from the environment in which they were taught. They must take responsibility for supporting education and demanding excellence from both their children and the education system.

Motorola wants to help its employees who are parents, grandparents, or citizens involved with schools to understand these new approaches to learning and assist them with their education responsibilities. This document on school restructuring is only the first step in this process.

Initiation of Lifelong Learning. Parents and teachers are responsible for helping children to understand early in life that learning can be fun and that growth is impossible without learning. Learning takes place when:

- The learner enjoys learning and is *actively* involved in learning.
- New knowledge is viewed as relevant and is connected to previous experiences.
- Basic skills are integrated with the thinking process.
- Opportunities exist to delve deeply into the subject matter.
- Opportunities exist to practice and get feedback.
- Teams solve problems that have multiple solutions.

All children can learn, but at different rates, and using different methods. The learning system must adapt to the needs of the learner, *not* force the learner to adapt to the system.

The impact of early childhood development on a person's future has been proven to be enormous. Motorola has completed an extensive study of early childhood development at the Summit School in Dundee, Illinois. Our study revealed that the average child, beginning at age two, can learn multiple languages, how to accomplish things through small-group interactions, and a positive attitude toward learning through exposure to a basic development program (Auclair, 1990). Numerous research studies have shown that the Headstart program (early childhood development for at-risk children) has a positive lifelong impact on achievement and significantly contributes to reduced dropout rates, incidence of teenage pregnancy, and drug usage. All research has shown that lifelong learning can be initiated at birth.

The education system structures learning as an individual effort (don't talk in class), as expert-driven (don't question the teacher), and as a series of memorized facts (teach to the test). The system is based on "experts" in policy positions establishing the standards and telling workers (teachers and principals) what to do and how to do it. In a performance system like Motorola's, leaders define the end performance and allow the workers to determine what to do and how to do it to meet the performance standards. This system requires continuous learning on the part of *every* employee as new solutions are developed.

The K-12 educational system will have American students for 13 years, while the workplace will have them for 40 to 50 years. During a lifetime, most people will change personal and career situations many times. Even if people don't change jobs, most jobs will change, requiring them to adapt. Most changes require new learning—learning that uses collaborative problem-solving skills, interpersonal skills, and an ability to adapt to ambiguity.

Motorola needs employees who are able to continuously learn as our workplace changes, to be flexible, and to work as members of problem-solving teams. These requirements will alter the focus of education to emphasize *learning* rather than simply the recall of facts. Thus, it is essential that children in the pre-K-12 school system be encouraged to develop critical thinking and problem-solving skills early and be taught to function in a collaborative environment.

Effective Schools. Methods for becoming an effective corporation can be applied to the educational system as well. We have shown at Motorola that change, to be effective and permanent, must be implemented as close to the workplace as possible. In the school system, this means that changes must take place at school sites themselves. This is referred to as "site-based management." School principals, like corporate managers, must feel empowered to establish effective schools and be rewarded for taking the risks that accompany change.

Motorola's model for effective improvement in the schools is called the Effective Schools Model. The effective school has:

- strong instructional leadership (the principal)
- a clear, focused mission shared by the principal, teachers, staff, school board, and parents
- a school climate that allows for high expectations of all students
- consistent and frequent monitoring of student progress, and
- a stable, orderly, and safe school environment.

Motorola supports public policy and systemic change that will move education closer to the Effective Schools Model. Parents, school board members, and every member of the community must work together to cause policymakers and educators to move toward this or a similar model.

Initial Individual Action Steps

Individuals can help create the climate and provide the expertise to make educational reform a reality in America. It is here that I see a real role for older adults in the process of educational restructuring. Motorola suggests several action steps:

- Become knowledgeable about the crisis in education. Read the vast array of reports on education issues in newspapers and magazines. (A forthcoming Motorola "Parent Power Pack" will educate employees about the education crisis and impress upon parents the importance of their role in the education of their children.) Continue your own lifelong education through reading or returning to school.
- As a parent, taxpayer, and citizen, *demand* that the educational system become accountable for what it produces. The system must report on what its programs achieve, not simply how many people they serve.
- Support school leadership and teachers who are able to report students' progress in each of the five skill categories required by the "worker of the future." These are:
    1. Language/communications skills: the ability to read and write; to comprehend and easily use a wide range of printed materials; and to speak clearly and effectively;
    2. Quantitative skills: the ability to perform basic mathematical computations, understand charts and graphs, and apply these skills to analyze or synthesize quantitative problems;
    3. Problem-solving skills: the ability to reason and solve practical problems, follow complex written or oral instructions, and deal with situations in which there may be several variables;
    4. Interpersonal/attitudinal skills: personal qualities of self-esteem, motivation, reliability, and punctuality; the ability to deal with and work cooperatively with others; acceptance of the concepts of lifelong learning, uncertainty, and change; and
    5. Job-seeking/self-advancement skills: the ability to assess one's abilities and ambitions and to obtain the skills needed to fulfill them.
- Become involved in local school councils, parent-teacher organizations, and school boards. Question legislators about their familiarity with education issues and find out how their proposed legislation will improve the quality of the education of *every* child. Attend parent-teacher conferences. Sit in the classroom on a regular basis to observe the teaching/learning taking place. (Motorola has established a time-off policy for its employees to allow parents to visit and volunteer in their children's schools.)
- *Demand excellence.* Become a volunteer to share your expertise with students and teachers. Participate in tutoring and mentoring programs such as the Motorola Education Volunteer Network which links Motorola employees

and retirees with local stu-dents and classrooms. In the future, Motorola retirees will be able to volunteer to be corporate education coordinators to facilitate these kinds of intergenerational learning experiences.

Conclusion

Improvements in the American K-12 educational system must happen quickly if this country is to remain a leader in the global marketplace. The 1980s was the decade of improvement in the quality of products and services; the 1990s must be the decade of improvement in the quality of people. This is not something any single individual, business, corporation, or institution can do alone. But we must at least start with individuals willing to help. The Motorola Model of Restructuring represents just one view of how schools could be improved to produce the kinds of people and workers that our country will need in the future. To compete globally, governments, businesses, institutions, parents, grandparents, and children must all be appropriately involved.

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